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ABSTRACT

The purpose of Project ACCESS is to increase the capacity to provide information resources to aid educational decision-making and problem-solving, thereby leading to improved education in Colorado schools. This report presents a set of data pertinent to the evaluation of Project ACCESS during its first year of operation with value judgments regarding those data, and makes recommendations about potential decisions affecting the project. Participating in the project were a director, a professional resource specialist, and six field agents. The report contains a description and illustration of the resource linkage system; descriptive summaries of 19 interviews conducted with field agents, their supervisors, and a sampling of their clients at the four project pilot sites; and a summary based on questionnaire responses from field agent workshops. (Author/MLF)

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PROJECT ACCESS
EVALUATION REPORT
YEAR 1 (1976-77)

Norris Harms
John Ritchie

October, 1977

Bureau of Educational Field Services

SCHOOL OF EDUCATION
UNIVERSITY OF COLORADO
BOULDER, COLORADO

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PROJECT ACCESS - YEAR 1 EVALUATION REPORT

## I. OBJECTIVES OF EVALUATION

The purpose of this report is to present systematically a set of data pertinent to the evaluation of project ACCESS during its first year of operation, to present value judgements regarding those data, and to make recommendations pertinent to potential decisions affecting the project.

Stated very simply and briefly, the purpose of project ACCESS is to increase the capacity to provide information resources to aid educational decision making and problem solving, thereby leading to improved education in Colorado schools. In order to achieve that purpose, three general classes of outcomes are necessary:

1. that decision makers affected by ACCESS be provided information resources, that those resources are adequate, that they facilitate decisions, and that those decisions have impact on Educational programs,

2. that ACCESS activities affect a significant proportion of educational decision makers,

3. that ACCESS functions and activities take root in state and local systems to an extent beyond that supported by federal funding and become firmly enough established that they continue when federal funding is withdrawn or when personnel turnovers occur.

This report will discuss the progress of ACCESS towards achievement of these three outcomes.

Evaluator Role

This report has been prepared by Dr. Norris Harms and Mr. John Pitchie of the Bureau of Educational Field Services (BEFS), University of Colorado and is based on evaluation activities performed by BEFS during the period of February, 1977 - September, 1977. BEFS has acted as an external contractor to provide objective, decision oriented evaluation information. Other evaluation information has been collected by the National Testing Service (NTS) as part of an NIE grant. However, that organization does not plan to provide information specific to individual states.

Evaluation Audiences, Decisions To Be Made

The report is intended to be useful to a number of audiences who will need to make decisions regarding project ACCESS.

Because most of the information included in this report has already been shared informally with the project staff, the staff is not the primary audience for whom the report is intended. However, it is hoped that the organization of previously fragmented information into a comprehensive whole will be of value in making future decisions.

Decisions to be faced by project staff include:

1. As project ACCESS enters an expansion phase, how much emphasis should be placed on a.) expanding geographically, b.) broadening the resource base, c.) consolidating and organizing the resource base, d.) field agent training,

2. What should be the roles of the various persons associated with the project staff.

A second audience which makes decisions regarding project ACCESS includes policy makers at C.D.E. They need to decide a.) how huch to supplement federal funding with state funds, b.) whether to continue the project after federal funding ceases, and c.) how to fit ACCESS into the organizational structure at C.D.E.

Local, district, and BOCS administrators need information to help decide a.) whether to adopt ACCESS, b.) how much funding to provide, and c.) efficient methods to incorporate ACCESS into their existing structure.

Another important audience includes program and project directors, consultants and others in C.D.E. who need to make decisions regarding the extent to which they will become involved with ACCESS, and the form such involvement should take.

Finally, NIE must also be considered an important audience of this report. NIE must make decisions about the levels of funding for future years, whether to make discretionary funds available to this particular project, and whether to recommend Colorado's model to other states embarking on similar projects.

## II. PROGRAM SPECIFICATIONS

### Philosophy and Rationale

Project ACCESS is based on the assumption that educators consciously attempt to improve their programs, that there are many information resources available to help them improve those programs, and that facilitating the flow of this information from sources to users will result in better programs and better education for students.

### Objectives and Staff Aims

The long range goal of project ACCESS is to facilitate the flow of pertinent information to those educational decision makers who need that information to improve educational services. To achieve that goal, ACCESS has identified the following purposes:

1. Identify resource and information needs at all levels K-12.
2. Identify information needs of staff in schools and organizations within the state.
3. Build, refine and coordinate a system for statewide dissemination.
4. Expand the resource base of information necessary to influence change in the classroom.
5. Strengthen the process for linking that base of information with practitioners in school districts.
6. Develop awareness and support for dissemination as one process for improving instruction.
7. Conduct an information study in the pilot sites which would result in an assessment of information needs by teachers, principals and central administrators and those channels of communication which are currently being used by those target groups.

One first-year general objective was to get the project "off the ground." Specific first-year process objectives included the organization of the ACCESS staff, establishment of an advisory council, development and testing of a linkage model, development of an evaluation model and data collection techniques, identification of pilot sites and field agents for those sites, determination of training needs, development of training programs, developing awareness of the project in CDE and at pilot sites, and laying the groundwork for future expansion of target areas, the linkage network and the resource base.

The Project Setting

Eventually, project ACCESS hopes to affect all areas of Colorado. This means it must accommodate the needs and idiosyncracies of the inner city, affluent suburbs, small cities and isolated rural communities. Historically, most educators in Colorado have not had ready access to adequate educational resources. Many districts have recently begun to pool some resources and seek solutions through Boards of Cooperative Service. However, the largest districts have a tendency to work alone. The State Department of Education is working toward establishment of a service role, providing leadership but not dictating local programs. Given this context, it is clear that ACCESS must be flexible in its' approach. It has no mandate for implementation, and can operate only through the support of local educators, and with the cooperation of the CDE departments.

Conceptual Model of ACCESS

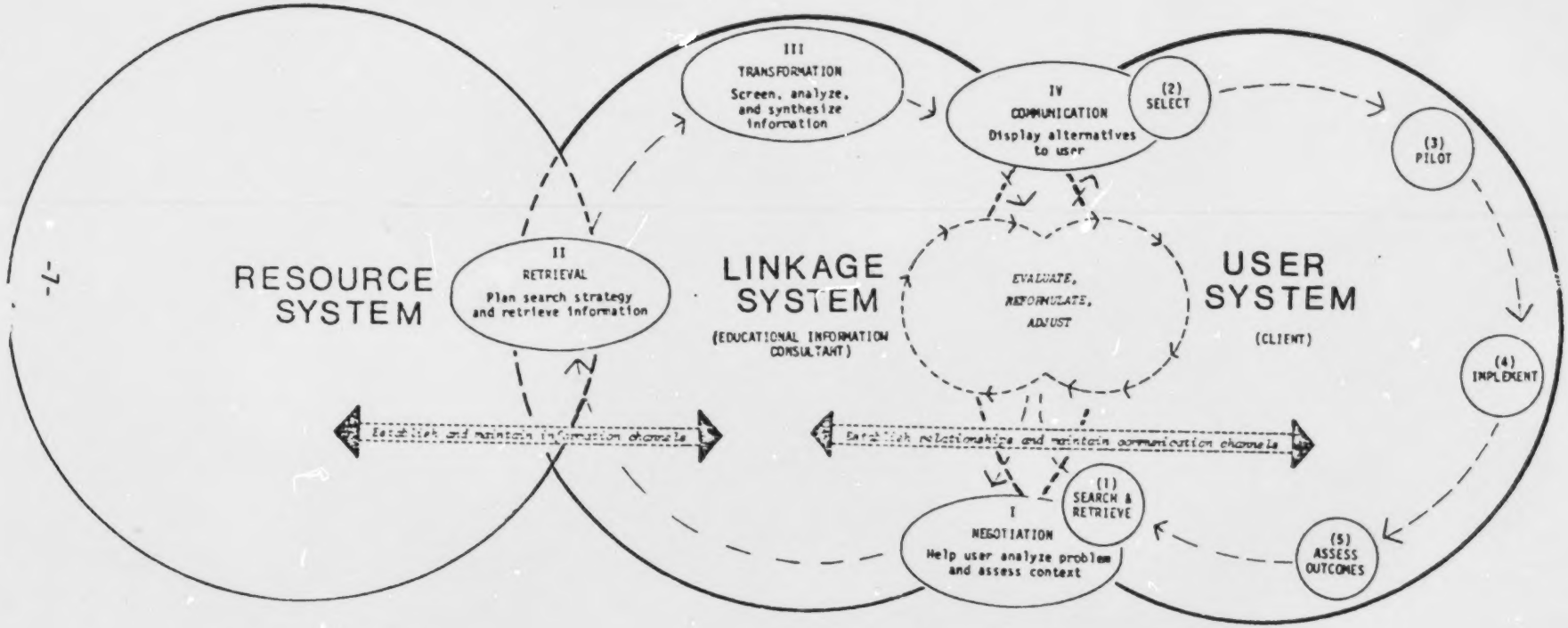
Any theoretical model of a resource linkage system must of necessity oversimplify components of the system and the relationships between those components. However, it seems important to convey to the reader the way in which ACCESS is conceptualized by those involved.

Exhibit I, "A Process Model of the Educational Information Consultant Role" presents a very general picture of the ACCESS theoretical structure. ACCESS is depicted by the circle in the middle - the one which connects users with resources. In dealing with a particular client or client group, the linkage system first interacts with clients to help define the clients' problem, the decisions to be made and the types of resources needed by the client (I-problem negotiation). The linkage system must then interact with the information, program, and human resources which comprise the resource system and select from the various resources information appropriate for the client and his problems (II-Retrieval). The linkage system then organizes and transforms the resources into a form which will be useful to the client (III-Transformation). The resource is then delivered to the client (IV - Communication). The client then sets a course of action partly determined by the resources he selects (2- selection), This course of action is put in motion (3- pilot), implemented (4), and the outcome assessed (5). By this time, the client is ready to seek new information (1), and linkage system cycle may be repeated.

Theoretically, the client may be in the awareness stage (" I'd like to survey current literature to learn about programs for the

Exhibit I

A PROCESS MODEL OF THE
EDUCATIONAL INFORMATION CONSULTANT ROLE

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Research and Development 3/71

gifted"), the planning stage ("We are planning a program for the gifted, and we need consultants to determine necessary components."), or the adoption stage ("We are adopting the Johnson County gifted program, and we need help in planning inservice training"). In each of these stages, the client may go one or more times around the circle depicting the user system. In the long run, the linkage system should perform a continuing, interactive role of decision facilitation and resource delivery.

Year 1 Operationalization of the Model, (Intended)

This conceptual model could be implemented operationally in many ways, using any number of staffing patterns, role definitions, and emphasis on activities. During its first year, ACCESS operationalized the mold with the specific clients, activities and resources depicted in exhibit II, "Project ACCESS Year 1 Operation". Four pilot sites were to be identified, and each pilot site would receive funding to support one half-time field agent. The target client population for the first year was implicitly defined as educators ( and some non-educators) working in the four pilot sites.* The field agents were to provide the linkage functions of negotiation, transformation and delivery. In some cases they also would serve the "resource specialist" function of retrieval, i.e. they identified specific resources and connected the client with those resources. In other cases, they would refer resource requests to an information specialist for retrieval. The field agents role would require that they be familiar with specific resources and resource systems and the nature of the resources available from those systems. In order to make their services known, the field agents would need to implement various awareness activities at their sites.

Administration and coordination of field agent activities were to be carried out by the project director (Diane Wilson) and the resource specialist (Cheryl Chase). They would identify and organize resources,

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* Pilot sites included one large district and three Boards of Cooperative Services (BOCES) which are discussed later.

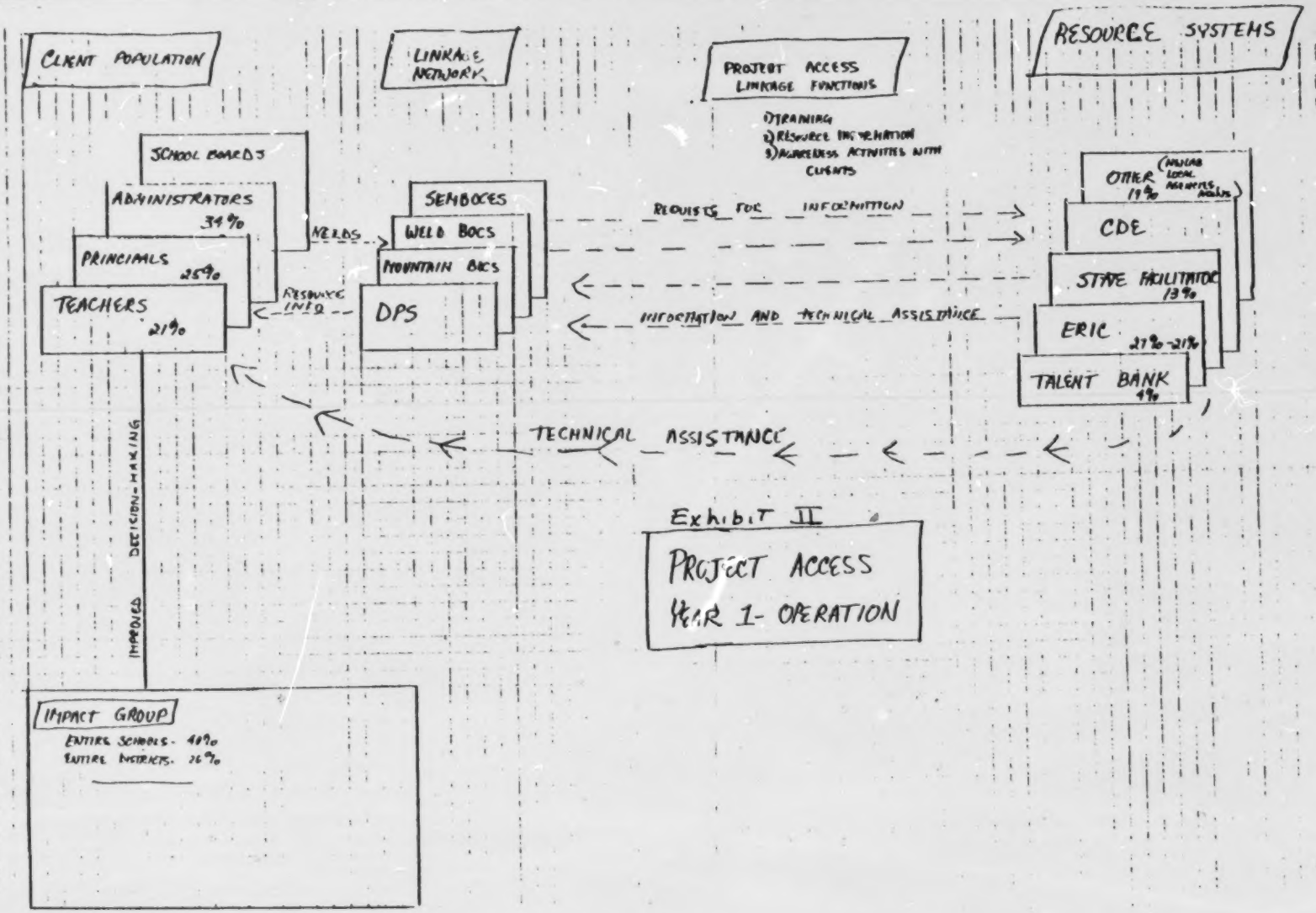


Exhibit II

PROJECT ACCESS
YEAR 1- OPERATION

provided field agent training and establish working relationships with persons representing the resource base.

External guidance for the project would be provided by an advisory group. This group would include representatives of the target sites, C.D.E., the State Title IVC facilitator and other resources.

During the first year, the resource base would consist primarily of: 1. the State Title IVC facilitator office and the programs available through that office; 2. ERIC and associated literature bases accessible to hand and machine search; 3. the CDE talent bank; 4. CDE personnel; and 5. other assorted resources available form the Northwest Regional Laboratory, local agencies, etc.

III. PROGRAM ACCOMPLISHMENTS AND OUTCOMES (ACTUAL)

Process Outcomes

The project encountered no serious problems in "getting off the ground." A highly qualified project director (Diane Wilson) was employed, a professional resource specialist (Cheryl Chase) was employed half time, and a literature search contract was signed with the Northern Colorado BOCES. Four pilot sites were selected from seven applicants, field agents were selected for each site and an external evaluation was contracted.

An advisory council composed of qualified, concerned, influential members was formed. The council was convened in five one-half day to one day meetings. Despite heavy work loads of council members, meetings have been well attended. They have worked hard to provide intelligent review of ACCESS activities and to give advise regarding ACCESS plans. Members of the advisory council have generally exhibited support for ACCESS activities and express confidence in it's eventual success. (For a list of advisory council members, see Appendix I).

A linkage model was conceptualized (see previous section for a description of the model), implemented and tested. In his interviews with all field agents, evaluator John Ritchie found them each to be supportive of the ACCESS model and comfortable with their roles in the model. (For a complete text of field agent interviews, see Appendix II). The main reservations held by the field agents concerning their role in the model revolve around time requirements. These concerns were most severe in cases where the field agents had other important responsibilities in their local organization and were unable to focus full attention to

project activites. Field agents also expressed the feeling that their role expectations (by central staff) lacked clarity.

There is some evidence that the field agents operated in a narrower role than that conceptualized in the model. Of the nineteen cases reported in the case documentation (Exhibit 3 and Appendix IV), field agents reported a "linker" role in 13 cases, did not report any role in 4 cases, and reported a "process helper" role in only two cases. In some of the client interviews it became apparent that the client had been made aware of only limited resources available (ERIC), and had received no follow-up after material delivery.

Further evidence of somewhat limited role perceptions of field agents was the feeling by some that filling in the "decision situation" parts of the case documentation and recording of information in the case log was unnecessary and something to be done only to satisfy the project director and project evaluator. If one conceives the field agent role in any particular case to be as a continuing resource, seeing a case through to its conclusion, such record keeping is extremely important for the field agent involved. However, if the field agent role is seen as a one-shot delivery of resources, such documentation is not apparently useful.

Training needs of field agents were determined by literature review and by feedback from the field agents. Four field agent training workshops were held in the Spring and two during the Summer. In general, the field agents judged the workshops to be "useful" to "very useful", and "effective" to "very effective" in meeting their

objectives. However, the field agents generally expressed needs for "moderate" to "intensive" additional training in "knowledge of resources" and "problem negotiation."

Based on telephone interviews with two assistant commissioners at the Colorado Department of Education (CDE), and with various other informal conversations with CDE personnel, it appears that the project has gained considerable visibility at CDE. Persons interviewed report that most CDE personnel are aware of the project, how it operates, and its potential.

The project has been successful in laying groundwork for future expansion activities, both in CDE and at target sites. Various dissemination activities across the state, including inclusion last year of interested non-target-site persons in workshop activities, resulted in the expansion to four new sites during the second year. These four sites are not being compensated for field agent salaries or training. However, they are each receiving token level ($1,000/site) funds for literature searches. The project director has also been successful in obtaining funding during year two for a full time (rather than half time) resource specialist who will be able to concentrate more effort in organizing and developing the resource base.

Evaluation activities have been implemented during year 1, and an evaluation plan developed for future years. A "case documentation" instrument has been developed and refined (see Appendix IV for an example of a "case documentation"). This instrument serves to record the activities of the field agents on a client-by-client basis. Coupled with user feedback forms to be developed in the second year, this instrument will provide information relevant to outcome class I, i.e; the quanitity,

quality, and type of services and resources provided, the types of clients served, the type of decisions impacted, the role played by the field agent, the impact of project provided resources on educational decisions, and the magnitude of those decisions on students. Field agent training has been evaluated, and recommendations stemming from that evaluation have been followed in planning of subsequent inservices. Evaluation design and activities were evaluated by an independent evaluation specialist from another university and were found to be "....well designed....., cost effective,.... and with no serious problems." (See appendix V for the "Meta-evaluation Report").

Field agent roles, activities and level of effort varied across the four sites. The field agent interviews (Appendix II) provide insight into these various roles and levels of effort expanded.

Product Outcomes

Data relevant to general classes of outcomes, I and III listed at the beginning of this report, are reported in this section. In each case, the variables of interest and data source are listed, a summarized set of "desired outcomes" is described and a summary of indicators of achievement of those outcomes is presented. No data are available on variable II.

I. Variables Measured: Quantity, Quality and Type of Service and Resources Provided to Client, and Impact of Those Resources on Clients' Educational Decisions

   A. Data Source - Field Agent (through case documentation)

      Summarized across cases:

      1) Number of clients in each position served (e.g., teachers,

principals, supervisors, counselors, etc.)

2) number of clients served in each educational area (e.g., reading, writing, arithmetic, minorities, special education)

3) potential total number of students to be affected by decisions facilitated by ACCESS resources

4) number of each type of resources provided

5) field agent time per case

6) role of field agent

B. Data Source - Feedback from a sample of clients

1) role played by field agent in decision-making

2) quality of resources provided through ACCESS

3) adequacy of field agent contact

C. Desired Outcomes on Variable I:

A wide variety of resources will be provided to decision makers on all levels. Resources will have major impact on decision and those decisions will impact large numbers of students. Decisions will affect a large number of areas of education including reading, writing, and arithmetic, and will result in the adoption of innovative practices. Field agents or other linkers will plan a decision facilitator role in addition to a resource provider role. Clients will view the resources as appropriate, adequate, of high quality, and timely.

D. Actual Outcome on Variable I:

The summary data from 59 cases documented during the Spring of 1977 are presented in Exhibit III.

Fifty-nine case documentations were received from February through the first week of May, 1977. The two main types of clients were principals (25%) and teachers (21%) followed by superintendents, district supervisors, education specialists, and project coordinators. These clients heard about Project ACCESS primarily through the field agents (55%) or colleagues (16%) and project presentations (9%).

PROJECT ACCESS
CASE DOCUMENTATION SUMMARY

# Exhibit III

59 CASES

POSITION OF CLIENT: 12 teacher 1 dept. chairman 14 principal 5 supervisor 6 superintendent ___ school board 2 lay 17 other

NUMBER OF PERSONS F.A. DEALS WITH DIRECTLY IN CASE: 1 = 39 2=3 3=1 4=1 5=3 6=2 8=1 9=3

HOW DID CLIENT LEARN OF SERVICE? 9 colleague ___ brochure 5 project presentation 30 field agent 2 news article 1 district of BOCS newsletter 1 CDE consultant 7 Other

THIS DECISION WILL HAVE PRIMARY IMPACT ON: 24 students 13 teachers 11 admin. 13 other

AREA MOST IMPACTED BY DECISION: 20 curriculum/instruction 6 administration 5 organizational development 5 staff development 12 school improvement 2 accountability/evaluation 1 counselling 5 other

IN WHAT STAGE IS CLIENT? 23 awareness 25 planning 1 trail/eval. 7 adoption

IF PRIMARY IMPACT GROUP IS NOT STUDENTS, HOW MANY PEOPLE IN GROUP IMPACTED? 1=2 6=3 7=2 8=2 16=1 20=1 30=1 32=2 42=1 60=1 75=1 100=1 231=1 400=3 total=1088

HOW MANY STUDENTS WILL RECEIVE IMPACT? 5 one classroom 3 multiple classrooms 14 whole school 2 multiple schools 9 whole district 1 multi-districts

ANTICIPATED MAGNITUDE OF IMPACT ON STUDENTS: 3 limited 8 moderate 20 major 3 tremendous

GRADE LEVEL OF STUDETNS AFFECTED: 10 K-6 4 7-9 18 10-12 1 multiple

TYPE OF STUDENT AFFECTED: 16 general 7 special ed. 2 bicultural/bilingual ___ other minority 3 gifted 6 other

CURRICULAR AREA: 5 math 1 reading 3 lang. arts 1 science 1 social studies ___ music 1 art ___ phys. ed. ___ minority studies 1 career/voc 2 early childhood 1 media-library 13 multiple areas 5 other

KIND OF RESOURCE PROVIDED: 17 ERIC 13 other product 2 talent bank 11 other human resources 8 state facilitator 12 other programs/ project

WHAT WAS THE PRIMARY PURPOSE OF RESOURCE: 21 awareness 32 planning 2 trial/ eval. 8 adoption

HOW APPROPRIATE WAS THE RESOURCE? 1 poor 3 fair 24 good 26 excellent

HOW MANY DAYS BETWEEN CLIENT REQUEST FOR RESOURCE AND DELIVERY? 14 1-3 12 4-10 11 11-17 4 18-24 5 25-31 ___ 32-38 2 39-59 2 over 60

HOW WAS RESOURCE DELIVERED? 30 FA in person 3 FA phone 13 mail 6 direct from source 2 other person ___ other

COMPLETED CASES 19

TOTAL NUMBER OF FIELD AGENT HOURS SPENT ON CASE IN: Preparation 67 (19) travel 23 (18) person to person contact 32 (21) other 0 (10) total 106 (19)

APPROXIMATE NUMBER OF: PHONE CALLS TO CLIENT 29 (20) TO RESOURCE 22 (18) MEETINGS WITH CLIENT 24 (19) WITH RESOURCE 12 (19) LETTERS TO CLIENT 3 (19) ___ TO RESOURCE 2 (19) ___

HOW MANY DOLLARS DID CLIENT PAY FOR RESOURCES IN THIS CASE? 500 (19) ___

WHAT WAS THE MAIN ROLE PLAYED BY THE FIELD AGENT IN THIS CASE? 13 linker 2 process helper ___ solution giver

SUMMARY OF TRANSACTIONS 25

The clients were generally in the awareness (41%) or planning (45%) stages of utilizing requested information. Curriculum/instruction (36%) and school improvement (21%) were the two areas most impacted by decisions. The population receiving primary impact from the affected decisions was divided among students (42%), teachers (23%), and administrators (19%).

Decisions facilitated by the project had impact on 2788 teachers and other non-students. The number of students receiving impact from the project were commonly entire schools (40%) or whole districts (26%). The anticipated magnitude of impact on students was judged generally to be major (60%) or moderate (24%). The general (44%) and special education (21%) fields were most often affected. Grades most often affected were the secondary (55%) and elementary (30%). Project assisted decisions more often affected multiple curriculum areas (38%) than single areas.

In reference to the resources provided by the field agents, their primary purpose was for planning (51%), or awareness (33%), and their appropriateness was viewed by the field agents as good (44%) or excellent (46%). ERIC searches (27%), other literature (21%), products (journal articles, idea booklets, State Faciltator Project programs (13%), other programs/projects (19%), and human resources (17%) were the divisions of resources provided. The majority of resources were delivered by the field agent in person (55%) followed by mail (24%) and direct from source (11%) deliveries.

About a third of the cases have been closed. In these cases the field agents averaged 5.6 hours per client split between preparation (55%), person to person contact (26%), and travel (19%). In terms of field agent phone calls and meetings per case, he/she does 1.5 phone calls a client, 1.2 phone calls to a resource, 1.3 meetings with a client, .6 meeting with a resource. The main role played by the field agents in these cases is that of a linker (87%) and sometimes a process helper (13%).

Clients interviewed (Appendix II) generally considered the products to be of excellent quality. Most felt the turnaround time to be satisfactory, but in some cases delivery was too late for client purposes. Clients were generally more aware of, and confident in delivery of literature resources than human resources and program resources. Some clients reported follow-up by the field agents, but others reported no follow-up.

To Summarize: A variety of resources was provided to a wide variety of educational decision. makers. Decisions facilitated by the resources generally affected large numbers of students and in a wide number of educational areas. Resources were benerally reported to be of high quality. Field agents generally played a "resource provided" role rather than a "decision facilitator" role.

III. Variable Measured - Permanence of Impact on Colorado Dissemination Capacity

A. Data Source - Project Records:

1. ACCESS adoptions by non-funded sites
2. Incorporation of CDE activities into the resource base of project ACCESS
3. Expansion of activities at funded sites beyond those activities funded by project ACCESS (also from field agent records)
4. Expansion of CDE funding for project ACCESS activities
5. Robustness of ACCESS activities to personnel turnover

B. Data Source 6

Interviews with those who make decisions regarding ACCESS (i.e., BOCS directors, superintendents, CDE personnel).

1. Perceptions of value and impact of ACCESS
2. Intentions to fund ACCESS locally
3. Incorporation of ACCESS activities into BOCS, district and state level projects (e.g., as part of a staff development program, or as a vehicle for dissemination of innovative programs)

C. Desired outcome on Variable III:

State funding will begin to supplement federal funding during the second and third year of the project and will assume funding

at the end of three years at a maintenance level or at a higher level. At funded sites, decision makers will value ACCESS highly, locally funded activities will begin to supplement ACCESS funded activities during the second and third year of the project, and funding will expand at the end of three years to replace federal funds.

Resources from most CDE departments will become important ACCESS resources, and various CDE departments will include ACCESS as an integral part of dissemination plans. At the local level, ACCESS will be included as an integral part of local programs such as staff development programs, school change programs, etc.

D. Actual Outcomes on Variable III:

ACCESS has established a strong foothold in the field. For its second year of operation, ACCESS has been adopted in three new BOCS sites which receive only minimal funds from ACCESS for literature searches and no funds for staff salaries. In addition, the Denver site has funded and filled a full time field agent position from the district staff-development budget. The one-half funded field agent at Weld BOCS is actually spending full time as a field agent. At Mountain BOCS, a number of local "gatekeepers" have been trained, and their activities provide a non-funded supplement to field agent contact activities. Thus, three of the four original sites are providing locally funded activities which are at least equivalent to those funded by ACCESS. This financial support by three first year sites and three new sites constitutes a strong vote of confidence in ACCESS and reflects a strong local feeling that first year activities established the value of ACCESS.

In the Spring interviews, the responsible administrators for each of the four sites expressed confidence in the potential of ACCESS. Three of the four feld confident that the cost of ACCESS could be picked up locally when federal money is withdrawn.

Vulnerability to field agent turnover appears to be somewhat of a problem. This is especially true in sites where only one field agent operates. However, it is important to note that Mountain BOCS successfully weathered a situation in which the field agent was ill for an extended period of time. During this time, the BOCS director and the gatekeepers kept the project going until a new field agent was employed and trained. It would appear that the best insurance against vulnerability to field agent turnover is to have other people at the site who are involved in the project and committed to its success.

The position of ACCESS at its home base (CDE) appears more tenous than its position in the field. One can point to a few cases in which CDE activities were incorporated into the ACCESS resource base during the first year (e.g., School Climate Improvement, Gifted or Talented Programs). However, CDE comprises a tremendous pool of human and other resources which, in the opinion of this evaluator, could be effectively connected to ACCESS to the benefir of both CDE and the client population.

At this time, the committment of CDE to the continuation of the project beyond federal funding is not clear. The budjet for the year 2 proposal does include a total of $134,000 of state funds. This includes $4,000 budgeted for resource center development, $5,000 for office expenses, $4,000 for printing resource guides and $2,000 for printing dissemination information. The remaining approximately $120,000 is budgeted as fractions of time of existing CDE consultants and services. If these services are actually incorporated into ACCESS, this represents a considerable committment by CDE. However, if these resources don't actually find their way to the project, the CDE committment seems relatively small (roughly equivalent to resources committed by each field site).

## IV. SUMMARY AND RECOMMENDATIONS

### Accomplishments

ACCESS has had an extremely successful first year. In an exceptionally short time after the selection of the project director in October, the project became operational. A competent and dedicated central staff was put together, pilot sites were identified, field agents were quickly and competently trained and went to work serving clients. A linkage model was developed, tested and proved workable. A wide variety of clients making decisions affecting large numbers of students, were served with resources they generally considered to be very helpful. Considerable awareness of the project was generated in CDE. Decision makers in the field indicated confidence in the project by providing budgets for local funded activities for year two which were several times larger than local budgets for year one.

### Problems

As should be expected after such a short time, some goals still remain to be accomplished. Within CDE, personnel from various departments are aware of, but not involved in, ACCESS. Funding intentions for future ACCESS activities seem uncertain, and the "organizational niche" of ACCESS remains to be defined.

There have been some time limitation and priority conflict problems among the field agents, especially in cases where they are already carrying a heavy professional load. These time-priority problems, coupled with considerable skill requirements in working with clients are compounded by the need for the field agent to be an expert in resources. The result is that some field agents are forced into a narrower role than that suggested

by the linkage model. In this narrower role, they do not have time to interact sufficiently with clients, nor to search all relevant sources for resources to meet client needs.

Recommendations

In order to alleviate the above problems, the following recommendations seem appropriate:

1. Every effort should be made to involve CDE personnell in the project, both as resources and as clients
2. CDE policy-makers should consider allocation of more resources to ACCESS in the future. The long-term question of how ACCESS will fit into CDE organizational structure needs to be addressed.
3. As a prerequisite for participation, any potential site should agree to provide at least a half time and preferably a full time person to act as a field agent. This field agent should complete all training designated by the project and provide the required documentation of activities. (For a more complete treatment of this recommendation, see Appendix VI, "Recommendation, Full Time Field Agents")
4. The time and expertise requirements for resource retrieval placed on field agents should be reduced. This can be accomplished by the development of a central resource center which can organize and catalog resources and take on much of the resource search responsibility now carried by the field agent. (For a more detailed treatment of this issue, see Appendix VII, "Special Evaluation Report: Resource Organization").

5. Provide more in-depth training in the specific areas of problem negotiation and resource transformation, follow-up, and generally in the areas of establishing the broader linkage agent role defined in the linkage model.

# I. ADVISORY COUNCIL MEMBERSHIP

DISSEMINATION ADVISORY COUNCIL MEMBERS:

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Colorado Department of Education

Roy Brubacher, Assistant Commissioner
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Colorado Department of Education

Cheryl Chase, Resource Specialist
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Dr. Roscoe Davidson, Superintendent
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Gene Stortz, Librarian
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Darrel Davis, Executive Director
Weld BOCS

## II. SPRING 1977
## SITE VISIT INTERVIEWS WITH
## FIELD AGENTS, ADMINISTRATORS AND CLIENTS

PROJECT ACCESS INTERVIEWS SPRING - 1977
JOHN RITCHIE

I did 19 interviews with field agents, their supervisors, and a sampling of their clients, in the four project pilot sites, during May 24 to June 3. I have included descriptive summaries of these interviews to be used as background reference. My evaluative summaries and recommendations were submitted to you at the June 6-7 field agent workshop and Norris is presently using this input for his final write-up of the project summative evaluation.

The field agent interviews dealt with the following concepts and activities: 1) field agent role - expectations, components, priorities; 2) personal needs - project relationships, security support system, time constraints, satisfaction; 3) Project Access - confidence in the concept and service, quality, structure, obstacles; 4) case documentation - reactions, improvements; 5) clientele - their needs, dissemination or service strategy, awareness level; 6) resources - adequacy, strengths/ weaknesses, human resource contacts, ERIC - State Facilitator Project - Talent Bank.

The supervisor interviews were directed toward four concerns: 1) Project Access - level of support and confidence in the project concept and services; 2) project continuation - present and future financial and political security; 3) field agent - impressions of role and services, level of interaction; 4) BOCS and Project Access - type of interfacing or degree of complementation of goals and processes.

The purpose of the client interviews was to get feedback in five areas: 1) Project Access- their awareness level, how they heard about it, and how they feel about it; 2) the field agent - their expectations and what kind of experience their interaction with the field agent has been; 3) resources - what resources they know and how they've reacted to those utilized through the Project; 4) needs - what are their building and personal resource needs, and 5) case documentation - whether this report accurrately reflects the situation.

WELD BOCS PILOT SITE
FIELD AGENT - BOB EWY

Bob started the project with naive enthusiasm but continues to feel very good and confident about the project. The quality of resources are good and will get better. The support from his BOCS and the project has been very good. The Project Access field agent position is very secure at the BOCS now but there hasn't been talk yet about the security of the project after federal funding ceases. His reaction to Rob's visit was that it was worthwhile, (but he was hesitant). Bob didn't get a pre-visit call from Rob which he expected. He felt Rob was brought in to assist all the field agents who have unique problems and needs and perhaps an assessment of specific pilot site needs and specific consultants brought in to match the needs would have been more helpful.

Bob sees his field agent role as fitting right into his other BOCS responsibilities in the area of Curriculum and Program Evaluation. He places great importance on personal contact, particularly in the awareness and initial use stages. The locations of his districts up and down highway 85 allow for repeated personal contact. Gatekeepers are not needed now but will be in the future if requests continue to increase. In terms of field agent phase priorities, he sees preparation, or location of appropriate resources, as most important, followed by transformation. Bob's only frustration with the job is stopping at the delivery stage. He'd like to be more of a change agent, to be involved with the client in their utilization of the resources. At the present Bob has contacted all administrators personally in regards to Project Access. All teachers and administrators have received two BOCS newsletters describing how to use Project Access and what's available. His strategy now is to concentrate on the teachers. Since late Spring is a different time to introduce new materials to teachers he will send out the BOCS newsletter again and approach teachers at their Fall orientations. Bob works fairly independent and considers himself first a part of the BOCS. One advantage that helps direct teacher efforts toward Bob for assistance is that there are no curriculum specialists in his seven districts. He feels he's had complete freedom to develop his field agent role.

Time is not a problem now because in essence he is working "full time" for Project Access. However, if requests should realistically double next year, he won't be able to provide the same quality of service, nor could he this year if he was really half-time. Bob may go to school next year but if he does he'll continue to work as a field agent half time. He feels good about his progress in the project, particularly for his growth in transformation skills which he considers so critical for facilitating client use.

Bob has not used the Talent Bank. His experience with the State Facilitator project has been very good- he likes the "idea" books put out by NECBOCS. ERIC searches have been good- the turn-around has been 2-3 weeks which has been alright since most requests haven't been urgent. He asked whether the actual research is done at Longmont or UNC. In terms of completeness, he felt Project Access was weak in dealing with very specific requests.

Bob's in full support of the case documentation approach. However, he wouldn't naturally record as much depth in his case work without it. He gave some suggestions for improving the level and impact questions. Because he attaches a xerox copy of his search request form to the back of his case documentation form, he doesn't have a need for a request statement on the form itself.

DARRELL DAVIS, DIRECTOR, WELD BOCS

Darrell is very supportive of Project Access and Bob. Although he has not been a direct user of Project Access services, the feedback he's gotten from principals and superintendents is that they are pleased with the quick turnaround, the completeness of the materials, and the professional way the requests have been handled. His confidence in Project Access has increased throughout its development- he's surprised at its efficiency.

Darrell's pleased with his relationship with Diane. There have been no problems and her follow through on responses has been good. Although at this time nothing concretely has been done about local future funding of Project Access after two years, the BOCS board has clearly indicated its support by already budgeting Bob's other ½ time work which is so similar to his Project Access responsibilities. The Project is now very secure with the Weld BOCS. Darrell sees Project Access as a natural fit into BOCS services and responsiveness to their districts and Bob's two job responsibilities fit so closely that he's functioning like a full time Project Access field agent. His supervisory relationship with Bob is very good, with regular interaction and up-date on the project. He feels Bob has a high degree of credibility with the districts and relates well with both the administrators and teachers. Darrell personally turns to UNC and branches like WICHE for human resources needed and has not used the Talent Bank. He sees the biggest obstacle for Project Access is to get people to use it and this will come about through satisfied users.

WELD
BOCS CLIENTS (2)

I spoke with Dean Crosier, high school principal, on May 31st. He had requested a search on school board policies relative to out-of-state administrative travel. He heard about Project Access at a principals meeting where Bob gave a presentation. He feels very positive about the Project and hasn't any suggested improvements at this time. He had made a verbal request to Bob at a meeting and evidently Bob had forgotten about it. However, when he called Bob about the request it was delivered in two days. Bob had mentioned the other major Project resources to him and did follow-up on the request. The case documentation write up accurately reflected the request and services. Dean has not used either the State Facilitator Project or Talent Bank. He turns to the BOCS or the University for contacts on human resources. His interactions with Bob have been very good and he's found Bob very receptive to personal contact and easy to reach by phone. His school's greatest resource needs now are for literature. His teachers are aware of the project, though he is not aware of their using it yet, as they must go through him to use Project Access.

I interviewed Alberta Pedroja, high school reading teacher, on May 27th. She requested reading materials, and testing information to assess skill levels of 8th graders entering high school. She had heard about Project Access through newsletters put out by the BOCS. Her contact with Bob has been mostly in person- to discuss the request, receive materials, and follow-up. The curriculum materials were very good. She made a point of saying how she has appreciated the affective support of Bob through their contacts. The personal contacts and services have been open and helpful. She had gotten materials from UNC and federal materials but didn't seem to be aware of all the other specific resources available through the Project. For human resources she turns to colleagues. The turnaround time for project requests has been 2-4 weeks and there has been follow-up many times. The case documentation write-up accurately reflects the situation. Alberta feels positive and confident about the Project.

DENVER PILOT SITE
FIELD AGENT - DOROTHY MAJOR

Dorothy is very confident in the project design and feels Project Access offers quality services. She identifies field agent time, and the time lag in getting educators to use a new resource and process, as her major obstacles in the project. Her relationship with Diane and Cheryl is excellent on both a working and personal level. Their response to problems has been excellent. Rob's visit was seen as providing some good ideas but taking too much time. Her expectations of his visit were different from what happened- she thought he was coming with specific solutions to ner previously identified problems.

Dorothy feels very comfortable in the field agent role as she feels she was doing the same things before but now is more aware of, and better able to retrieve, resources. She has been focusing on awareness and use of resources by administrators. The selection and use of Gatekeepers is seen in the near future according to their willingness and commitment to the project needs and expectations. Her role next year is unclear at this time but she'd like to supervise the 1-3 new field agents proposed in her Staff Development Plan. Dorothy has met her project objectives for the awareness stage and now needs manpower to follow through. The identification, and time effort, of gatekeepers are vital. She can't get to teachers herself because of time limitations. Making administrators users of the project is her priority clientele and face-to-face personal or meeting contacts has been most effective in enhancing others' awareness of the project.

Having enough time to fulfill the expectations and complete role of field agent is a big problem. Dorothy has full time demands put on her through her responsibilities as Director of Curriculum for Elementary Education. The time demands will be met next year if the staff development plan for the center is adopted which is budgeted for three field agents. Dorothy would like support from the project in terms of documentation of what she and Joanne have done to increase awareness and support of the project for their supervisors and other central office administrators. In terms of job and project security, Dorothy feels that her staff development plan will insure the security of Project Access at the Denver site through incorporating it as a natural function of the organization, supported by local funds. Selecting and developing gatekeepers next year will require project workshops. She feels good about what she has thus far accomplished as a field agent.

What the districts need next is a formal systematic "needs assessment" to give the administrators and field agents more direction and support in their mutual efforts. Everyone in the central office, one representative in every high school, and a representative in every cluster of elementary schools has been contacted personally about the project. The protocal in establishing the support and credibility of a new project has been established. Now that the beginning stages have been accomplished, more active follow through work is needed.

ERIC has been an excellent source. The turnaround time has been about two weeks, and 2 days when urgently requested. The State Facilitator Project is top quality and has been prompt in their services. She has not formally used the Talent Bank but has turned to CDE for assistance in identifying human resources. Dorothy has some frustration in not knowing as many resources as she'd like to at the present. She'd like somewhere to call to

get guidance toward resource areas to look for specific resources. More information on, and from, NIE and the Northwest Lab would be appreciated. When asked whether she was getting feedback from her clients, she said she wasn't because she was just beginning the process of working with them. She thought formal feedback would be useful, but later when the project has proved it's worth.

Dorothy's reaction to the case documentation approach is that it's workable and the information is valuable for the Project but it's difficult to do with time constraints. Filling out the form is not natural but necessary. She sees the documentation becoming more important and useful as her cases increase in number. She finds the "hours" section very difficult to estimate.

DENVER FIELD AGENT - JOANNE MCELDERRY

Joanne feels very confident in the project and that it's going in a good direction. The project goals and processes fit naturally into her Special Education role. She's "100%" behind Diane's direction and her emphasis on variety of resources. Joanne feels the time she's invested in the Project has been profitable, and the quality of services and resources are excellent. However, she thinks it's most important to be careful about what we promise in services and resources. Her relationship with Diane and Cheryl is very good and she sees them as very competent persons. For support she goes to Dorothy for project concerns and Elise for information needs, but considers herself very independent. She views project personnel turnover as a real problem but doesn't have a solution. Joanne had mixed reactions to Rob's visit. The specific information he gave was good but asking her "where she was at" was not helpful to her. She would have preferred a half day rather than a full day.

Joanne sees the field agent role as that which the project advocates. Although she hasn't done a lot in all the role phases she's learning and feels good about each phase. She gave two detailed examples of her transforming information for two clients. Gatekeepers are favored for the future but didn't appear to be an important issue to her at this time. She feels very positive toward the field agent phases- especially the question-negotiation and transformation phases. Joanne has not been receiving funds from the Project for her field agent services.

Time is a problem because she feels she was already carrying 1½ positions before her Project Access responsibilities. In the future her time concerns will depend on Dorothy's staff development plan. Joanne wants feedback from the users, and therefore is sending the form attached by NECBOCS to the searches, to the clients to be returned to her. Perhaps this form could be altered some to specifically meet field agent feedback needs.

There was a question concerning use of the NECBOCS feedback form attached to searches. Is the form to be filled out by field agents or users and is it to be sent back to the NECBOCS or field agent? By having it filled out by the user and sent back to the field agent it provides a good timing for follow-up, indicating when the resource has been read over. She feels very good about ERIC as a resource for broad areas but wasn't getting much on either specific or current concerns. The State Facilitator resource has been excellent. She has not used the Talent Bank. Colorado Network is developing a talent bank in the area of special education for the district IRC's. She said the problem in the past with talent banks is that they've gone obsolete quickly.

In reference to the case documentation form, Joanne sees the back as natural and helpful. However, she would not normally fill out or need the front side and feels the decision making box is a pain to fill out. Recommendations on changing the backside were to give more space for "Outcome" and less for "Purpose" and "Hours." She presently records the request and transformation divisions on the log. She expressed some concerns about it being difficult to decide when and whether a case was closed, and the confidentiality of the summary statement.

FRANK ROBERTS, ADMINISTRATIVE DIRECTOR OF ELEMENTARY EDUCATION -DENVER

Dr. Roberts has been very supportive of Project Access since its inception and feels good about its progress in Denver. Although he has not made resource requests to Project Access directly, he has heard good feedback about the project services. His working relationship with Diane has been very good. In his supervisory relationship with Dorothy he has almost daily contact.

In reference to the district picking up Project Access after termination of federal funds, he feels the Project will be picked up indirectly. This is exemplified by the present staff development plan developed by Dorothy. He supports a strategy now of reaching all the 120 principals in the district. Gatekeepers are critical in the future for increasing personal linkage contact and services. Frank supports the splitting of responsibilities between Dorothy and Joanne because they complement each other. He is highly supportive of the competency and work of Dorothy. Both Dorothy and Project Access are very secure in the Denver system.

DENVER CLIENTS (3)

I interviewed Jim Tracy, elementary school principal, on June 1st. He's been interested in math programs and has received materials from both Dorothy and Joanne in this area. He had not heard about Project Access before using its services but had heard about the Stram math program and was referred to Dorothy. Later the Project was explained by Dorothy at a meeting of principals. State Facilitator Project and ERIC contacts have been good. The turnaround time for the materials was three weeks. Since receiving the materials, he has had no follow-up contact from either Dorothy or Joanne. The case documentation accurately reflects the request and background but could be more descriptive in resources provided and multiple deliveries. He has not used the Talent Bank and goes to the District for human resources. Jim doesn't go outside the district for human resources because that costs additional money which the district doesn't have.

He feels he has a good understanding of Project Access although he hasn't used it enough to be aware of its capabilities or its weaknesses. His teachers are not yet aware of the Project but he will make them aware of it next fall. He feels comfortable in having his teachers use the Project directly. The materials received were very good and he feels positive and confident about Project Access.

I spoke with Carol Barber, Project Specialist in Mastery Learning, on June 2. She heard about the Project through personal contact and staff meetings with Dorothy. Through her Project Access requests she had received State Facilitator Project, and other, math programs- STAM, COMPS, and SMART. She was very impressed with the STAM materials and they have been implemented in five schools and are being considered in four other "spin-off" schools. The materials were received within 2 weeks of the request. The case documentation accurately reflects the earlier stages of services but not the follow-up nor the multiple resources delivered. Carol sees an equal need for literature, expertise, and project types of resources. She has not used the Talent Bank but turns to the staff at the Center for human resources. Project Access has greatly facilitated district assistance for helping others obtain resources by identifying a specific person that has this responsibility. Her relationship with Dorothy is super comfortable. Dorothy is overworked, and although this is no problem for Carol, in terms of contact and assistance, it may be for others in the district. She feels that her colleagues throughout the district are fully aware of Project Access. She's very supportive of the Project overall.

I interviewed Lois Wharry, head of the Denver IPCD Program, on June 2. She had asked for a literature search and ERIC search on a new mandated law. The search was unsuccessful in finding any recent studies but it is still considered an "open on-going" request. She had heard about Project Access through a brief presentation by Joanne to the Special Education staff. Her interaction with Joanne has been good but there has been no contact since the unsuccessful searches over two months ago. Lois is very supportive of

the Project. She feels that her needs are for literature searches first and project/program models next. Human resources can be found within her department and through close professional contacts, along with the Special Education Network being developed state-wide of human resources in every district. Her contact with the State Facilitator Project has been excellent and she has not used the Talent Bank. The case documentation write-up accurately reflects the request and services. A suggested improvement for Project Access is to have written guidelines of how to initiate requests and utilize the project without being dependent on personal contact with Joanne.

SEMBCS PILOT SITE
FIELD AGENT - BARB WEIGHTMAN

Barb feels good about the Project. After initial good feelings the bottom dropped out wherein there were misunderstandings of her expectations and confusion at SEMBCS. However, these negative feelings have come around to present positive feelings. Her project responsibilities have fit in naturally with, and are supportive of, her work in staff development and in-service training. Rob's visit was helpful in that he was supportive of her seeing a need to help districts go through developmental stages with Project Access and not jump into it quickly.

The district within SEMBCS are naturally resistant to federally funded programs that require local funds after a few years for continuation. They had an initial fear that the project offering would get out of hand and that too many requests would dilute the quality of response by the field agent. Each district wants to control or select what areas the field agent will focus on in their district. It is unclear now exactly which requests are considered Project Access requests. The general guideline is that they must be at the administrative building or district level (not teacher requests) and come through the SEMBCS advisory committee. To deal with individual teacher requests would violate the advisory committee or to go through the committee would create too much delay. Most requests have ended up being at the project/program level though many have started at a literature search level.

Barb feels good about the field agent role being split with Ruth. She feels better about Ruth retrieving literature needs and that her awareness of these resources is sufficient for the question-negotiation phase with the users. She wouldn't want to change her field agent role in any way- there is no conflict between what it is and how she'd like it. She felt pushed to jump into the role immediately with an overemphasis on results. There's a need to develop, sequentially, her involvement with users and she has gone back to doing this- giving service to those now aware of Project Access. The field agent role is seen as a good vehicle for staff development and fits well with her other responsibilities. It's difficult to differentiate what is, or is not, Project Access work relative to her responsibility to "other" requests. She's supportive of the different phases of the field agent role- feels she needs more experience in developing the transformation skill.

Barb has notified all the building staffs and curriculum committees in the four districts. She feels that the best process for selling the project is good service. Committee presentations have been a chief vehicle for making principals, teachers, and counselors aware of the project. She has just completed a needs assessment of her districts for inservice and information needs and feels this will help a great deal in providing support for usage of Project Access. Barb is in support of selecting and utilizing gatekeepers. They have to be selected by the local people. She recommends curriculum people, teachers, and in-service type people for gatekeepers. Her priority clientele at this time are building administrators so that at a later time teachers can be approached in a healthy way. She now feels that giving more support for district concerns rather than individual requests will be more favorable in the future for establishing a network. A well defined process in each district can best compensate for the turnover in field agents. The security of Project Access in SEMBCS depends on Barb's recommendations. She feels good about the project although has had some guilt feelings about SEMBCS not needing the project as much as in other areas of the state.

Feedback from users of Project Access has been that the products have been very good. Barb feels very good about State Facilitator Project and ERIC. The turnaround time for ERIC has been slow- 3 to 4 weeks when requests are sent to NECBOCS. Although she has made recommendations to the Talent Bank, the districts aren't using this source. SEMBCS is developing an in-service talent bank.

For case documentation, only those cases coming out of the advisory committee are recorded. It would be overwhelming to record all teacher and administrative questions and problems. In her role as "trouble shooter" for the districts, Barb gets multiple requests every day. Barb supports the necessity of case recordings but not for all requests.

SEMBCS FIELD AGENT - RUTH VOGEL

Ruth is confident in Project Access and feels the concept is a great idea. Her relationship with Diane and Cheryl is good. She appreciates Diane coming to SEMBC meetings. Ruth feels good about what she's done for those who have used Project Access and sees her role and Project Access as secure with SEMBCS. However, in terms of the future, Project Access presently offers free computer search services and she's not confident that districts will pick up this part of the project when federal funds terminate.

Ruth is involved in only one part of one phase of the field agent role. She does the retrieval of literature searches. She says she can't do much transformation without personal contact with the user. She likes what she's doing but ideally would prefer personal contact with the user for clarification of the request and proper follow-up. However, time and job limitations prevent this. Project Access requests are differentiated as those coming from buildings or districts. Individual districts want to decide what Project Access will respond to and her advisor committee wants to be the liaison between the field agent and the district users. However, presently there are no guidelines specific to each district. Districts are hesitant about offering Project Access to everyone for fear of getting too many requests that can't be filled properly. Ruth handles a Project Access request differently from other requests by being more extensive in her searching and using more resources. Her top priority in selling the project is to make the delivered materials attractive to the user.

The concept of splitting the field agent role with Barb is supported. The advantages are that two people are having input on prioritizing the materials and her constant contact with literature searches complements Barb's lack of experience in this area. Her feedback from Barb has been good. It's easy for them to keep current contact by phone. She'd like more feedback from Diane as to whether she's doing what is appropriate, and if not, how she can improve.

ERIC and the State Facilitator Project are excellent sources. There's some client resistance to the follow-up and evaluation associated with State Facilitator programs. The ERIC turnaround has been about 3 weeks which is too long for some requests.

The present definition of what constitutes case documentation recording includes only those requests from administrators. Ruth feels o.k. about the case documentation form- it's necessary and good. However, it's not natural for her in that she generally just keeps and files notes on requests and findings.

BOB COOLEY, DIRECTOR, SEMBCS

Bob has high expectations for the impact of Project Access in his four districts. He feels that now there is confusion around its use and that they have slowed the publicizing or dissemination of the project so as not to have it become overloaded before the quality is fully developed. He wants to place a priority on solutions to problems and requests rather than number of contacts. Project Access can't be everything for everybody. Each district needs to set a few priorities for the field agent to focus on- this hasn't been done yet. A needs assessment in each district and some more structure and direction from Barb and Diane would be helpful. The Advisory Committee has been skeptical about setting priority areas but needs to do this.

Bob has been a user of Project Access once, but the three week turn-around time to get a response on the ERIC search was too late for him to use it as desired. He feels alright about the ½ time position being split into two quarter time positions. However, a half time person is not enough- the BOCS needs a full time field agent. He wants to keep Project Access in the BOCS. Bob feels good about Barb's total responsibilities- she's done an excellent job in In-service Education. He doesn't know how well she's done in Project Access. There's been little direct supervision on his part and he's open to looking at, and clarifying, his role as supervisor in the project.

SEMBCS CLIENTS (2)

I interviewed Don Goe, Deputy Superintendent of the school district, on June 1. He requested an ERIC search and some microfiche and hard copies of educational documents. Project Access was brought to his attention by someone outside of it. Don was satisfied with the materials- they were good but not exactly what he wanted. The request was made by phone through his secretary. He has not used the State Facilitator Project or Talent Bank directly but has been called to go out as a Talent Bank resource. When human resources are needed he uses his own personal contacts. He feels the greatest type of resource needs in his district through Project Access are literature searches. They can use their internal resources for consultant needs. The turnaround time for ERIC was excellent- around 3 days. He feels real good about his interaction with Barb and Ruth and their services. They provided follow-up on the resources provided. The case documentation was accurate except for not recording any follow-up.

I spoke with Jack Fenlon of the District Office of Program Evaluation, on May 28th. The case documentation accurately reflected the request and provision of three resources- ERIC hand search, ERIC computer search at NECBOCS, and request for copies of articles. With the computer search he was referred by Ruth to Elise at NECBOCS and dealt with Elise directly. He felt the ERIC materials were excellent. However, he was not made aware of any additional types of resources beyond ERIC. He has not used the Talent Bank or State Facilitator project and generally uses the University as his contact for human resources. He said there has been no follow-up on any of the project responses or resources. Jack feels good about using Project Access for future requests.

MOUNTAIN BOCS
FIELD AGENT AND DIRECTOR MOUNTAIN BOCS - DON DAVIS

Don is confident in the quality of Project Access and feels it is on the "right track." After the federal funding of Project Access terminates in two years, he sees the districts assuming the functions of the project through the gatekeepers or the Mountain BOCS picking up the project. For support with project concerns he turns freely to Cheryl and Diane and feels good about his relationship with them. He is presently in the process of selecting a new field agent and that position is secure for the next two years with the Mountain BOCS. Don agrees that personnel turnover is a big problem for the project and is therefore requesting at least a two year commitment from the new field agent. Rob's visit was good because he was reinforcing, an authoritative source, knew valuable things going on, and gave help on how to deal with concerns.

The field agent's role is seen as supervising gatekeepers who are the chief contact persons for their local areas. The gatekeepers are to phone in the requests from which the field agent will fill out the case documentation form. Gatekeepers are selected by their districts. Don's very concerned about not putting extra paperwork on the gatekeeper for fear it will turn them off to their role. He wants the field agent to do all the paperwork. He does not want teachers to be gatekeepers. Don felt he had the freedom to develop the field agent role- that it was not already structured. Transformation by the field agent is not a priority as he feels the user can do this best. Don's present strategy is for the field agent to enhance the awareness and use of Project Access by superintendents and principals and to get gatekeepers to actively contact teachers. Flyers have been already sent to the school boards, central administrators, superintendents, and gatekeepers.

Time is not a problem except for making personal contact with the users. Because of his Director responsibilities at the BOCS, Don was not able to give enough time to the delivery of the resources. However, he feels that half-time is enough for a field agent to carry out his/her responsibilities with the aid of the gatekeepers. He would like the field agent to make more personal contact with gatekeepers and users than presently done. A problem now is that administrators are not getting to the teachers about Project Access. Each school needs a microfiche reader if they're to take advantage of the ERIC searches beyond the abstracts. He's surveyed gatekeepers and they feel alright about their training. He needs to clarify the role of the gatekeeper with each district.

The teacher and administrator resource needs are greater for literature than expertise or project needs. Don would like more of the booklet-type resource that come out of NECBOCS. He sent a list of the booklets available to the school principals and got a very good response. He is not aware of any weak resources and his clients are happy with the resources. The problem has been not in the resources but communication between districts about the resources. He says the Talent Bank is good but people don't want the anticipated repeated CDE expertise. They are not aware of local district resources. He presently gets human resources through colleagues. People also don't want the follow-up evaluation associated with Talent Bank and need more clarification of needs and expectations before consultants come out to the schools. His contact with the State Facilitator Project before Project Access was very good. He doesn't know the quality of the ERIC searches because he hasn't followed up on them. The ERIC turnaround isn't known because he doesn't receive the ERIC resources before they get to the user and isn't sure whether the ERIC searches

go directly to the user or the gatekeeper.

In reference to the case documentation form, putting in a request form is not necessary but alright if it doesn't add paperwork. Don doesn't record the requests for the NECBOCS booklets (about 15) on a case documentation form. A secretary has been typing a record of the requests but they're not receiving personal contact or follow-up. Don sees the necessity of the case documentation recordings but doesn't like to give up the time to do it.

In regards to the objectives and processes of his Action Plan established in March, Don has visited each BOCS district and CMC campus administration, has identified gatekeepers in each district, held one-day training workshops for district gatekeepers, and reported Project Access at regular BOCS meetings. He has not yet visited private schools or notified public libraries concerning Project Access. The Gatekeepers are negotiating questions at the district level and sending the request to the field agent. Don is facilitating the retrieval phase but only occasionally does transformation of the searches. Drayton's job termination and previous illness prevented his giving extra support in information utilization.

MOUNTAIN BOCS CLIENTS (2)

I spoke with Marilyn Richardson, school librarian, on May 25th. She had made a request for information on the use and selection of science fiction books for middle school library, and library materials for Chicano students. She heard about Project Access through the Colorado Network of the State Library. Since her request to the Project through the gatekeeper three weeks ago she has not received any materials or had any follow-up. She was not aware of any other resources, like State Facilitator Project or Talent Bank. She didn't know what to expect from the gatekeeper but feels he should know what he's doing and keep track of the requests for proper follow-up. The only contact thus far has been her initial phone call. Marilyn feels the top priority for the project now is increasing teacher awareness and not by means of pamphlets or newsletters. The biggest need for her school now is dealing with the new Middle School concept- curriculum, philosophy, schedules. She presently doesn't know of any local base for human resources. She is the representative of her school in regards to the project and would be very interested in attending a workshop on the project. We found the case documentation recording to be inaccurate in a couple of areas- due probably to field agent not having direct contact with her. She supports the gatekeeper concept- even with the additional red tape, because that person will know more of what's happening in the local area.

I interviewed Bill Fears, Director of Curriculum for the District, on May 25th. Bill is both a user of Project Access and the gatekeeper for his district. He feels good about the potential of the Project. Right now teachers view it as too formal. It's easier for them to turn to Educator Today or other instructional books for assistance. Bill's sent out a newsletter to all the administrators and teachers but knows this is not enough to make them aware of the Project. He will attend some school building staff meetings in the fall.

As a gatekeeper, Bill would like more project training on awareness of more resources and further clarification of the State Facilitator Project and Talent Bank. He views his role as handling the question-negotiation phase and delivery phase. The field agent does the retrieval phase and Bill doesn't see a need to do a transformation of the materials. He doesn't see the field agent much but this is alright for him since he can easily make phone contact. He really likes the booklets put out by NECBOCS. The reaction of administrators to the project has been good. He received two requests last month on testing but has been unable to get to them because of lack of time. The ERIC turnover has been within two weeks and he has not used the Talent Bank or State Facilitator Project. He feels his district needs are more for literature resources and the packaged projects. The teachers in his area have a strong need for college credit courses for recertification.

# III. SPRING 1977
# WORKSHOP EVALUATION SUMMARIES

## FIELD AGENT WORKSHOP FEEDBACK AND SUGGESTIONS

The following summary is based on questionnaires received from twelve participants at the January 27 & 28, 1977 Project "Access" Field Agent Workshop. The workshop was very successful in developing useful presentations and materials; providing needed project and role clarification; generating high morale and motivation for the project; demonstrating staff competence, enthusiasm, and support; bringing project people together, and getting the project "off the ground."

The abundance of material and information given at the workshop suggests a need for follow-up on both the skills and knowledge components for further clarification and development. More staff training workshops to practice role skills in small groups would address the expressed need for more practice and respond in the presentation mode felt most useful at the workshop. The workshop had a large impact on increasing morale and getting the project into an action phase and therefore immediate follow-up would be significant in sustaining this "activated energy" rather than letting it slide due to possibly less support experienced at the local level.

The participants were asked whether they perceived the workshop presentations as "very useful" (vu), "useful" (u), of "some use" (su), or "no use" (nu). They felt the Communication Simulation (64% vu, 36% u), Question Negotiation (70% vu, 30% u), Introduction to Transformation (60% vu, 40% u), and Development of Action Plan (67% vu, 33% u) presentations were "very useful"; the Introduction to Field Agent Role (50% vu, 50% u), Preparing for Retrieval (44% vu, 56% u), and Delivery of Resources and Follow-up (60% vu, 30% u) components were split somewhat evenly between "very useful" and "useful"; and Preassessment (60% u), Awareness of Resources (67% u), Introduction to ERIC (50% vu, 30% u), Introduction to State Facilitator (46% vu, 27% u), and Record Keeping and Evaluation (55% u) were "useful." None of the presentations were seen by the group as providing only "some use" or "no use."

The following responses to "open ended" questions reflects those summarized comments made by at least two participants. For solo responses and further clarification of all responses, please refer to the attached verbatim recording of all statements.

"Before the workshop, I was..." excited about the project's promise and wanted clarification.

"After the workshop, I..." felt pleased about my involvement, somewhat overwhelmed, and confident in the project and staff.

"The purpose of the workshop was..." an orientation to the project and field agent role and identification of available resources, and this was accomplished.

"The workshop succeeded in..." clarifying the need for important skills, conveying practical information, and improving awareness of resources.

"The workshop failed to..."(there were no "shared" responses but individual comments were) to clarify staff roles, organize resources, and provide as much practice as needed.

"The workshop experience changed my..." expectations of the field agent role and attitude toward the project.

"As a result of the workshop, I plan to..." explore resources more and become a more effective user of resources.

"As a result of the workshop our BOCS (District) will..." implement Project Access with the field agent role and utilization or resources for decisions, as presented.

"The workshop staff were..." super, well organized, concerned, enthusiastic, and professional.

"The staff could have improved by..." (no shared responses but individual reactions were) starting and ending earlier and providing more physical exercise.

"The workshop experience would have been better if..." more time was spent in experiential small group follow-up.

"The best thing about the workshop..." was the people and information presented.

"The worst thing about the workshop was..." (no shared responses but individual comments were) the sitting and "it ended."

"The pre-workshop packet was..." good and very helpful.

"The workshop materials were..." abundant and good.

"Other comments I have are..." the workshop was very helpful, comfortable, and enjoyable.

PROJECT ACCESS FIELD AGENT WORKSHOP

WORKSHOP LOCATION Denver art museum DAYS ATTENDING _____

**Please circle the appropriate number of the presentations you attend. Also indicate whether the presentation was of: No Use, Some Use, Useful, or Very Useful.**

| SESSION - Thursday, 1/27 | No Use | Some Use | Useful | Very Useful |
|---|---|---|---|---|
| 1. Communication Simulation | | | 4<br>36% | 7<br>64% |
| 2. Preassessment | | 3<br>30% | 6<br>60% | 1<br>10% |
| 3. Intro. to Field Agent Role | | | 5<br>50% | 5<br>50% |
| 4. Awareness of Resources | | | 6<br>67% | 3<br>33% |
| 5. Intro. to ERIC | | 2<br>20% | 3<br>30% | 5<br>50% |
| 6. Intro. to State Facilitator | | 3<br>27% | 3<br>27% | 5<br>46% |

PROJECT ACCESS FIELD AGENT WORKSHOP

Friday, January 28, 1977

WORKSHOP LOCATION Denver art museum DAYS ATTENDING

Part 1. Please circle the appropriate number of the presentation you attend. Also indicate whether the presentation was of: No Use, Some Use, Useful, or Very Useful.

| SESSION - Friday, 1/28 | No Use | Some Use | Useful | Very Useful |
|---|---|---|---|---|
| 1. Question Negotiation | | | 3 30% | 7 70% |
| 2. Preparing for Retrieval | | | 5 56% | 4 44% |
| 3. Intro. to Transformation | | | 4 40% | 6 60% |
| 4. Deliv. or Resources and Follow-up | | 1 10% | 3 30% | 6 60% |
| 5. Record-Keeping & Evaluation | | 3 26% | 6 55% | 2 19% |
| 6. Development of Action Plan | | 0 | 3 33% | 6 67% |

Part 2. We want your comments on this training session so that we can plan better sessions in the future. Would you please answer whatever questions seem appropriate. Use the space at the bottom of the back of this page for other comments. Thank you for your assistance.

1. Before the workshop I thought

2. After the workshop I thought

3. The purpose of the workshop was

4. The workshop succeeded in

5. The workshop failed to

6. The workshop experience changed my

Part 2. Continued

7. As a result of the workshop I plan to

8. As a result of the workshop our BOCS (District) will

9. The workshop staff were

10. The staff could have improved by

11. The workshop experience would have been better if

12. The best thing about the workshop was

13. The worst thing about the workshop was

14. The pre-workshop packet was

15. The workshop materials were

16. Other comments I have are

Before the workshop I (thought)
was pleased to be involved.
that this project was very exciting. Now I am really excited!!
why was I sent here? What does my district want?
I wanted information
I was prepared
the project had a lot of promise.
this project would be simple to implement
expected only an information-based "expert" lecture method of presentation.
I really appreciated the encouraged small group interaction.

After the workshop I (thought)
was even more pleased to be involved.
I had gotten info I needed
I'm not so sure
I had support in the importance of Reronch in everyday education.
the project will succeed - mainly due to the quality of the director and staff
wow- what did I get into
this project was better developed and closer to actualization than I had anticipated.

The purpose of the workshop was
accomplished effectively.
acquaint participants with each other and to presant an overview of the wide functions of a field agent. Also, to introduce field agents to resources available to them.
provide overview and some specifics on field agent role
to train and to acquaint persons of help. resources available to Colorado schools.
Clean, exciting.
to orient us about our roles and how we can fulfill needs expressed to us
orientation to the project
achieved
to familiarize, to motivate, to enhance confidence, to develop relevant skills, create interpersonal communication channels.

The workshop succeeded in
conveving a great deal of useful information.
creating a comradery amongst the group - a feeling of support and we're all in this "new" boat together and together we can get Project Access off the ground.
clarifying the need for certain important skills for the field agent
improving my awareness of the resources available to teachers and administrators in Colorado
getting the project off the ground
doing just that
providing me more sources and research
making me more aware of the art of negotiation
its objectives
providing me with more practical information
giving me a basic understanding of the project and establishing some good contacts

The workshop failed to

provide me with an overview of the project and a general idea of the purpose of the workshop.

provide as much practice as one needed, but could not because of time frame and frustration

help me to organize resource areas to simplify access to information and where to go for certain topic areas

keep me awake at all times

clarify the various roles of those in the workshop

The workshop experience changed my

orientation to delivery of resource services

view of the field agent role. It broadened and clarified my role through the provision of useful materials, experiences and contact with understanding and helpful people.

uncertainty to certainty as to first steps

perception of the project in that I now understand the real uses of the project's concepts. I was fuzzy on what was expected of us and now have a clearer idea of that expectation.

perception of the change agent vote - was a very positive experience

ideas about trying to operate too rapidly in developing and implementing Action Plan.

attitude toward the project

As a result of the workshop I plan to

make more effective use of resources.

become more of a process helpee and less of a solution giver!

go home all find up

search resources more

be a useful resource to our districts

work on a more limited basis with less people

explore ERIC and other computer information retrieved data bases in depth

As a result of the workshop our BOCS (District) will

implement Project Access.

begin to make people aware of Project Access and work towards implementing the field agent role as presented.

hopefully utilize resources to make decisions much better than they do now.

benefit

The workshop staff were

GREAT!

open, sincere, well-organized, fun, warm, understanding, caring, helpful, super!!!!

super

concerned, honest, experienced

professional and well organized.

well informed and enthusiastic

better than I expected - more personable and conscious of interpersonal needs and processes

The staff could have improved by

starting earlier (8:00 or 8:30) and finishing earlier. By late in the day people (I) really have a hard time focusing and attending. Heavy activities early and lighter tasks later would help although with the time you had to get across so much, you pulled off a miracle!! Congratulations!

providing more physical exercise--

The workshop experience would have bean better if

You might consider how you could work in more small group work rather than so many total group sessions.

I had been better prepared when I arrived

more time in experiential followup of some areas

The best thing about the workshop was

the people involved

the negotiation session in triads. REally a neat simulation and very helpful.

the new knowledge of people, resources

openness

the organization and content

wealth of information presented in short time

energy and people

The worst thing about the workshop was

Everything was done positively and for the most part worked well...it has been a most enjoyable session.

it ended

the sitting

The pre-workshop packet was

very helpful and needed!!!

good

excellent

informative- gave a good perspective of the role but little process information

good

The workshop materials were

abundant and helpful

lengthy, but I'm sure "down the road" all will be put to good use.

good

excellent

right-on in terms of needed information

ok

good for reference

Other comments I have are

You did a fantastic job. The workshop was extremely helpful I particularly appreciated the background information Rob and Buck provided out of their experience!

You three work well together! (Cheryle, Diane, Rob)

I have enjoyed. That people and good ones to know. The comfort of knowing I will get help when I need it. The happy discovery of so much material and help available to me.

I have never felt more comfortable in a workshop, It was enjoyable and I felt I was listened to processes were clean and voccable and the possibilities of the project are unlimited. I believe children will profit from what I have learned.

Good introduction to the whole process - might integrate more "case studies" of the process to give participants a better feel for the "nuts and bolts" of a EIC. Enjoyable time - well organized pleasant personalities

Anxious to start Access Project

## WORKSHOP EVALUATION SUMMARY AND SUGGESTIONS

The field agents of Project Access participated in a project workshop on March 14, 1977. The following evaluative summary was obtained from six feedback questionnaires. The workshop was somewhat effective in meeting its goals of clarifying individual needs, goals, and work problems through collaborative goal setting and decision making. The field agents expressed a need for moderate skill development in all the skill areas of negotiation, retrieval, delivery, transformation, and documentation, and a desire for skill development and further small group interaction processes in future workshops.

The workshop was "very effective" in "helping (participants) feel closer to the other project staff" (80% very effective, 20% somewhat effective, 0% ineffective). The participants felt the workshop was "somewhat effective" in achieving its goals of "helping you identify what you want to accomplish on your job" (20% ve, 60% se, 20% ie), "helping you clarify and verbalise work problems and obstacles" (20% ve, 40% se, 20% i), "identifying your immediate training needs" (80% se, 20% i), "involving you in the cooperative goal setting and decision making (eg. consensus) processes" (60% ve, 40% i), and "providing you a relevant and worthwhile experience" (20% ve, 60% se, 20% i).

When asked how well prepared they felt in the field agent role with the stated skill areas, the participants felt they needed "moderate" to "intensive" skill development in Transformation and Case Documentation (67% moderate, 33% intensive) and "moderate" skill development in Question Negotiation (17% little, 83% mod), and in Retrieval of Information and Delivery of Resources (17% little, 50% mod, 33% int).

The most effective part of the workshop was the identification of goals process in the morning, and getting to know each other better. The least effective part of the workshop was the goals prioritization in the afternoon. Two concerns expressed in regards to Project Access were time and long range planning. The great variety in comments on "what factors would improve the workshop" included more staff directiveness and specific input; more problem solving, sharing, and need clarification; and fewer established agendas. The field agents felt "the next step Project Access should take to best meet their present needs before the next in-service workshop" was more training and identification of resources, roles, and inservice needs, with specific references to CDE resources and ERIC turn-around.

In review, the most effective parts of the program - small group goal setting, interviewing, and "getting to know each other" exercise - were activities that facilitated active participation and interaction among everyone. The responses to preparedness in skill areas, factors to improve the workshop, and the next step Project Access should take, reflect an expressed need for skill development in all the listed areas. It is suggested that attention also be given to the two expressed concerns about "time," and further clarification of inservice needs and the expectations of staff at workshops (directiveness, input, structure).

FEEDBACK QUESTIONNAIRE

Project Access Workshop
March 14, 1977

1. Please indicate how effective you feel this workshop was in achieving the following goals:

| | Very Effective | Somewhat Effective | Ineffective |
|---|---|---|---|
| Helping you identify what you want to accomplish on your job. | 1 | 3 | 1 |
| Helping you clarify and verbalize work problems and obstacles. | 1 | 2 | 2 |
| Developing a group plan for meeting group needs. | | | |
| Identifying your immediate training needs. | 0 | 4 | 1 |
| Involving you in the cooperative goal setting and decision making (eg. consensus) processes. | 3 | 0 | 2 |
| Providing you a relevant and worthwhile experience | 1 | 3 | 1 |
| Helping you feel closer to the other project staff | 4 | 1 | 0 |

2. In the field agent role how well prepared do you feel you are in the following skill areas?

| | Need Little Skill Development | Need Moderate Skill Development | Need Intensive Skill Development |
|---|---|---|---|
| Question Negotiation (use of effective communication techniques in identifying needs and problems in client group) | 1 | 5 | 0 |
| Retrival of Information (analyse available resources, search and match appropriate resources problem or need) | 1 | 3 | 2 |
| Transformation (screen and highlight ERIC searches, compile usable package of information for user) | 0 | 4 | 2 |
| Delivery of Resources (using most appropriate delivery mode to reach user in anticipating needs for follow-up assistance) | 1 | 3 | 2 |
| Case Documentation | 0 | 4 | 2 |

What was the most effective part of today's program?

Goal setting in A.M. was well done.
Getting further acquainted with staff.
interviews
morning groups identifying goals
the "getting to know each other activity"; the afternoon discussion

What was the least effective part of today's program?

Evaluation discussion in P.M. - we may be premature on this one.
Felt nothing accomplished.
afternoon beginning activity
afternoon session
goals prioritization

What factors would improve the workshop?

More directive in furnishing what you perceive our needs to be
More sharing; fewer established agendas; more concrete problem solving
Assess needs of F.A. by telephone or mail before workshop; clarify specific needs.
More specific input of information from Project Staff.

What concerns do you have regarding Project Access?

I want it to be successful, as I see much promise in the program to help people.
Time
time & long-range planning
It's going well Diane.

What is the next step Project Access would take to best meet your present needs before the next in-service workshop?

A training session
going ok with all the help Diane gives
broader resource base; faster ERIC turn-around
Identify CDE resources; Identify change agent roles and inservice needs

## TRAINING SESSION EVALUATION AND SUGGESTIONS

Project Access provided a workshop for eight prospective "gatekeepers" in the Mountain BOCS district on March 16, 1977. The following evaluation summary reflects their feedback at the end of the workshop. The training session was very effective in achieving its goals of clarifying the Project and the "gatekeeper" role, and generating a strong willingness among participants to assume the gatekeeper role. A training workshop for these participants or an introductory workshop for other personnel in the district is suggested for Project followup. The expressed pleasure in the workshop by these participants suggests a continuation of the same presentation style and processes.

The training session was "very effective" in accomplishing its goals of "providing an overview of Project Access" (100% ve), and "providing the information you need in order to decide whether or not to get involved in Project Access" (88% ve, 12% somewhat effective). All but one of the participants (88%) felt their participation in Project Access would be "very beneficial" for their district and they were "definitely yes" willing to assume the gatekeeping role as described in the workshop.

In response to how well prepared they felt they were now to assume the gatekeeping role in stated skill areas, the participants felt they needed "moderate skill development" in Question Negotiation (12% little, 88% moderate) and understanding ERIC and the State Facilitator Project (37% little, 63% moderate), and "little skill development" in understanding the Talent Bank (75% little, 25% moderate) and Project Access in general (88% little, 12% moderate).

Half of the participants felt a workshop was the next step Project Access should take to best meet their present needs, and two people felt everything was ok at this point. Workshops were suggested for interviewing, district personnel, to answer questions arising from experience, and for principals, librarians, and teachers. Two concerns expressed regarding Project Access were selling the concept to personnel and whether the project would be enough to offset increasing demands for information.

All responses to what was the most effective part of the program were different, including ERIC discussion, questioning, question negotiation demonstration, workshop leader quality, explanation of entire process, and handout materials. The only response to what was the least effective part of the program and what factors would improve the workshop, were "all effective" and "none," respectively.

Most of the prospective gatekeepers seem to be asking for further training in Question Negotiation, with some asking for workshops on ERIC and the State Facilitator Project, and a similar introductory workshop for other district personnel.

FEEDBACK QUESTIONNAIRE

Project Access Training Session

**March 16**

1. Please indicate how effective you feel this workshop was in achieving the following goals:

| | Very Effective | Somewhat Effective | Ineffective |
|---|---|---|---|
| Providing an overview of Project Access | 8 | 0 | 0 |
| Defining the "gatekeeper" role | 8 | 0 | 0 |
| Providing the information you need in order to decide whether or not to get involved in Project Access | 7 | 1 | 0 |

2. How beneficial do you think your participation in Project Access would be for your district?

| Very Beneficial | Somewhat Beneficial | Not Beneficial |
|---|---|---|
| 7 | 1 | 0 |

3. Is the gatekeeping role, as described in the workshop, one which you are willing to assume?

| Definitely Yes | Probably Yes | Probably No | Definitely No |
|---|---|---|---|
| 6 | 1 | 0 | 0 |

4. How well prepared do you feel you now are to assume a gatekeeping role in each of the following skill areas?

| | Need Little Skill Development | Need Moderate Skill Development | Need Intensive Skill Development |
|---|---|---|---|
| Question Negotiation | 1 | 7 | 0 |
| Understanding ERIC | 3 | 5 | 0 |
| Understanding State Facilitator Project | 3 | 5 | 0 |
| Understanding Talent Bank | 7 | 1 | 0 |
| Understanding Project Access in general | 7 | 1 | 0 |

5. What concerns do you have regarding Project Access?

6. What is the next step Project Access should take to best meet your present needs?

7. What was the most effective part of today's program?

   What was the least effective part of today's program?

   What factors would improve the workshop?

What concerns do you have regarding Project Access?

None
None
Its ok
It will help, but wonder if its going to be enough to offset increasing demands for information
Selling concept to personnel

What is the next step Project Access should take to best meet your present needs?

Interviewing workshop
Let's just start taking search requests and go from there.
Workshop for district personnel
Ok at this point.
Ok.
Provide update or follow-up session to answer questions that arise from experience.
Workshops for principal. librarian & perhaps teachers

What was the most effective part of today's program?

Questioning
ERIC discussion and question negotiation demonstration. (11:00-12:00)
Quality of workshop leader
Explanation of entire process.
The resource available to the District
Hands on material

What was the least effective part of today's program?

All effective

What factors would improve the workshop?

None

WORKSHOP EVALUATION - PROJECT ACCESS
April 12, 1977

Project Access gave a workshop on April 12th to the field agents (6) of pilot sites and others assisting or interested in the project. This summary reflects questionnaire feedback from the ten participants. The present and future planned workshops were well received. It is suggested that the time constraint felt by three members be addressed and that case documentation be further clarified.

The participants felt the workshop was effective in achieving its goals- "very effective" (80-90%) in outlining future meetings and agendas, examining possible products to be developed this summer, making them aware of the new resource of reading materials developed by Northwest Reading Consortium, helping them feel closer to other project staff, and providing a relevant and worthwhile experience. The response, to the goals of clarifying the case documentation process, and sharing a transformation process and its results on change agents, was divided between "very effective" (56 & 63%) and "somewhat effective" (44 & 37%).

The biggest concern expressed regarding Project Access is "time"- three field agents feel they don't have enough time for the project or to fill project expectations. There were also single reference to more discussion on how Regional Exchange relates, and follow-up process. Individual participants see planning for next year, cataloging resources, continued bringing of new ideas into workshops, and continued training sessions as the next step the Project should take to best meet their present needs. One member feels his/her needs are being met and another that the future planned activities are excellent.

The responses to what was the most effective part of program were diverse, including: product development, reading, new resources pinpointed, transformation, and exchange of ideas. Field agents referred twice to ERIC and once to case documentation as the least effective part of the program. Two factors listed that would improve the workshop were field agents arriving on time, and not so much sitting, with three references to the workshop being very good.

IV. "CASE DOCUMENTATION" INSTRUMENT
(FILLED OUT), AND CONCEPTUAL RATIONALE

CASE # — YEAR: 77 | F.A.: 02 | CASE: 041

PROJECT ACCESS
FIELD AGENTS' CASE DOCUMENTATION SHEET

APR 11

Field Agent _____ Date 2/3/77

Client _____ School Ed. Services Center District Cherry Creek

Mailing Address 4700 S. Yosemite, Englewood, Colo. 80110 Phone 773-1184 (work)

Phone (home)

DECISION SITUATION (Problem Statement)

Client needed research for planning stages of project which will be designed to better orient students into the next higher academic level (elem. to middle school to high school). ACCESS will continue to provide other resources as project nears implementation.

4 POSITION OF CLIENT: 1-teacher 2-dept chairman 3-principal 4-supervisor 5-superintendent 6-school board 7-lgv 8-other (specify)

1 NUMBER OF PERSONS F.A. DEALS WITH DIRECTLY IN CASE: 1=1 2=2, etc. 9=9 or more

4 HOW DID CLIENT LEARN OF SERVICE? 1-colleague 2-brochure 3-project presentation 4-field agent 5-news article 6-district of BOCS newsletter 7-CDE consultant 8-other (specify)

1 THIS DECISION WILL HAVE PRIMARY IMPACT ON: 1-students 2-teachers 3-admin. 4-other (specify)

5 AREA MOST IMPACTED BY DECISION: 1-curriculum/instruction 2-administration 3-organizational development 4-staff development 5-school improvement 6-accountability/evaluation 7-counselling 8-other (specify)

2 IN WHAT STAGE IS CLIENT? 1-awareness 2-planning 3-trial/eval. 4-adoption

IF PRIMARY IMPACT GROUP IS NOT STUDENTS, HOW MANY PEOPLE IN GROUP IMPACTED?

IF STUDENTS WILL RECEIVE EITHER PRIMARY OR SECONDARY IMPACT, ANSWER 8-12

5 HOW MANY STUDENTS WILL RECEIVE IMPACT? 1-one classroom 2-multiple classrooms 3-whole school 4-multiple schools 5-whole district 6-multi-districts

3 ANTICIPATED MAGNITUDE OF IMPACT ON STUDENTS: (see guide) 1-limited 2-moderate 3-major 4-tremendous

4 GRADE LEVEL OF STUDENTS AFFECTED (1) K-6 (2) 7-9 (3) 10-12 (4) multiple

1 TYPE OF STUDENT AFFECTED: 1-general 2-special ed. 3-bicultural/bilingual 4-other minority 5-gifted 6-other (specify)

13 CURRICULAR AREA: 1-math 2-reading 3-lang arts 4-science 5-social studies 6-music 7-art 8-phys ed 9-minority studies 10-career/voc 11-early childhood 12-media-library 13-multiple areas 14-other (specify)

RESOURCE SECTION. FILL OUT ONE COLUMN AT THE TIME EACH RESOURCE IS PROVIDED.

| | Resource # 1 | 2 | 3 | 4 | 5 | 6 |
|---|---|---|---|---|---|---|
| 13. | 1 | 2 | 2 | | | |
| 14. | 2 | 2 | 2 | | | |
| 15. | 3 | 3 | 4 | | | |
| 16. | 3 | 2 | 3 | | | |
| 17. | 3 | 3 | 3 | | | |

KIND OF RESOURCE PROVIDED: 1-ERIC 2-other product* 3-talent bank 4-other human resources* 5-state facilitator 6-other programs/projects* (*specify in summary)

WHAT WAS THE PRIMARY PURPOSE OF RESOURCE? 1-awareness 2-planning 3-trial/eval. 4-adoption

HOW APPROPRIATE WAS THE RESOURCE? (F.A. Opinion) 1-poor 2-fair 3-good 4-excellent

HOW MANY DAYS BETWEEN CLIENT REQUEST FOR RESOURCE AND DELIVERY? 1)1-3 2)4-10 3)11-17 4)18-24 5)25-31 6)32-38 7)39-59 8)over 60

HOW WAS RESOURCE DELIVERED? 1-FA in person 2-FA phone 3-mail 4-direct from source 5-other person 6-other (specify)

SUMMARY SECTION: COMPLETE AT CLOSE OF CASE.

18. TOTAL NUMBER OF FIELD AGENT HOURS SPENT ON CASE IN: Preparation 08 travel 00 person to person contact 00 other (specify) 00 TOTAL 08

19. APPROXIMATE NUMBER OF: PHONE CALLS TO CLIENT- 08 TO RESOURCE- 01 MEETINGS WITH CLIENT- 00 WITH RESOURCE- 00 LETTERS TO CLIENT- 01 TO RESOURCE- 01

20. HOW MANY DOLLARS DID CLIENT PAY FOR RESOURCES IN THIS CASE? 000

21. 1 WHAT WAS THE MAIN ROLE PLAYED BY THE FIELD AGENT IN THIS CASE? 1-Linker 2-process helper 3-solution giver.

SUMMARY OF TRANSACTIONS, RESOURCES DELIVERED, DECISIONS, OUTCOMES, HOW THE SERVICE AFFECTED THE OUTCOME, HOW STUDENTS WERE AFFECTED, STAGES THE CLIENT WENT THROUGH.

Client requested written research information at the planning stage of his work on project. We provided hand search of ERIC-RIE and CIJE, had a search run out of NCEBOCS on project Follow-through, responded to request for particular book by ordering it from publisher, responded to follow-up requests for copies of articles from ERIC searches. Assistance has been offered for continued service through the planning and implementation of the project.

* Other projects: hand-search; book ordered
Case is still open.

FIELD AGENTS' CASE LOG.

Please make an entry for each transaction.

| CASE ID # | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| YEAR | | | F.A. | | CASE | | | |
| 7 | 7 | 0 | 2 | 0/1 | 0 | 0 | 1 | |

| DATE | TYPE OF COMMUN. | PURPOSE | OUTCOME, FUTURE PLANS, ETC. | HOURS SPENT (fractions ok) | | |
|---|---|---|---|---|---|---|
| | | | | PREP. | TRAVEL | IN PERSON |
| 2/3/77 | Phone | request for research | provided hand search | 4 | 0 | 0 |
| 2/14/77 | Phone | request for particular ED Document | ordered from publisher | ½ | 0 | 0 |
| 2/16/77 | Phone | request for additional information | requested computer search from NCEBOCS | ½ | 0 | 0 |
| 3/9/77 | Written | transformed search from NCEBOCS sent inform. with letter explaning material | | 2 | 0 | 0 |
| 3/24/77 | Written | request for copies of articles | photocopied from PIC collection and DU | 1 | 0 | 0 |

A-40

Conceptual Framework & Purpose of the Field Agents Documentation Sheet

1) Addresses the following information
   a) decision or action to be taken by client
   b) type of Resource provided
   c) cost of Resource (in terms of field agent time)
   d) effectiveness of product on decision
   e) impact of decision
   f) processes involved

2) Information is decision based, assumes purpose of project is to affect decisions. Assumes a very broad definition of "decision" (e.g. "deciding how to teach mathematics to kids")

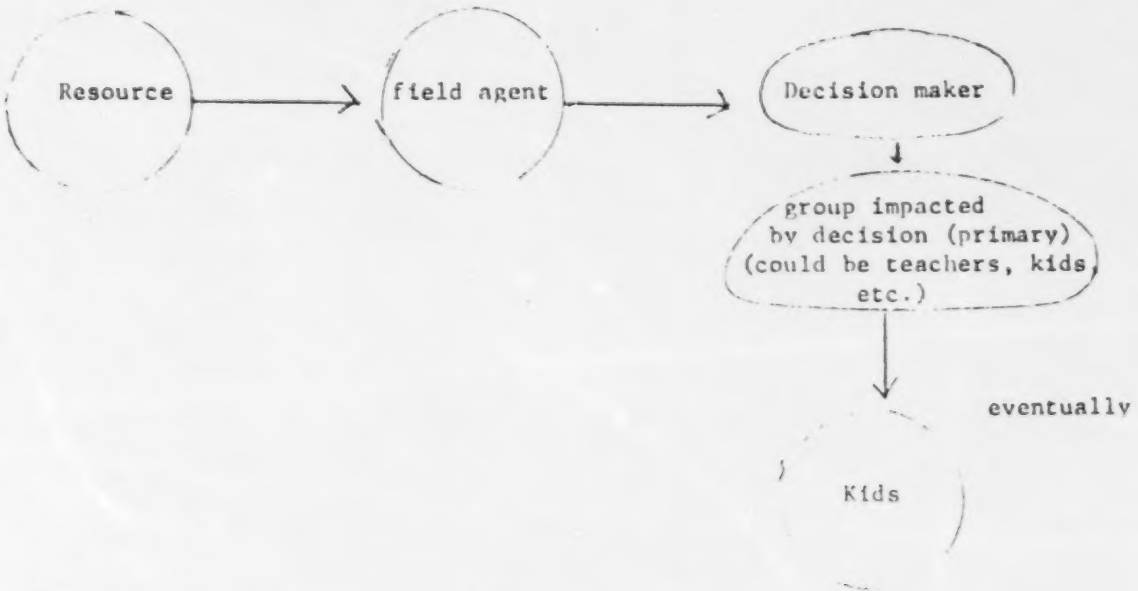
3) Collects data for many uses - including
   a) Field agents own records
   b) Summative evaluation data
   c) program description data
   d) feedback data (process evaluation)
   e) resource allocation data

4) Tallies and summaries can be made quickly and easily on a computer: Field agents should not need to go back and count how many teachers were served, how many principles, etc., cross tabulations can also be done on computer, answering questions such as - "What % of the teacher-originated ERIC needs were met by pre-packaged materials?"

5) Case ID number can serve as a central reference # through which information from all sources can be focused case by case.

6) Decision situation (problem statement) and summary will provide a concise narrative abstract of the case for historical and reference purposes.

7) Assumes this conceptual scheme



# V. META EVALUATION OF PROJECT ACCESS

# META-EVALUATION OF PROJECT ACCESS

Victor L. Willson, Ph.D.

University of South Dakota

This report is a review or meta-evaluation of the evaluation activities of the Bureau of Field Services (BFS), contract evaluator for Project ACCESS, awarded by the Office of Education, Department of Health, Education, and Welfare. The meta-evaluation procedure used is based on the criteria suggested by Worthen and Sanders (1973). The analyses are primarily logical and the intent is to improve the evaluation of Project ACCESS. The meta-evaluator was contracted to perform this evaluation after informal discussion with the BFS evaluators, Dr. Norris Harms and Mr. John Ritchie.

The report is divided into 11 criteria and each criterion is examined by Project ACCESS evaluation objective, of which there are three:

1. to provide evidence of the quality of services and resources
2. to estimate the magnitude of ACCESS impact
3. to final evidence of permanence of ACCESS activities beyond the funding period by HEW.

Criterion 1: Internal Validity

a) Quality - good design is being used, including control groups; perhaps more attention might be paid to the impact of ACCESS-supported decisions in school districts via case study in several cases. This is a costly technique for the payoff it gives, however.

b) Magnitude - some attention might be paid to users of information at levels below the building or district decision-makers to see if they are aware of ACCESS and use it. The use of a dissemination model such as Havelock and Rogers (1969) or Rogers and

Shoemaker (1971) suggests that such users are important in the process.

c) Permanence - even though this objective is not really measurable until after Federal funding is complete, trend analysis of the project and non-project districts' use of several resources over a 3-year period will help to answer questions of permanence. Usage rates by year (or semester) on the TALENT bank, ERIC, State resources, etc. will indicate if the general trend for ACCESS districts is increasing over non-project districts.

Criterion 2: External Validity

a) Quality - an easily performed analysis is to perform discriminant analyses and canonical correlations between client characteristics and the type of resources used. This will provide some generalized results of predictive value that will tell future ACCESS staff the types of resources needed by various kinds of clients.

Another analysis of generalizability interest is to estimate costs such as:

1. cost per pupil effected for the total project
2. cost per pupil by resource type
3. cost per pupil by field agent or district

This will allow planning of budgets for future activities.

b) Magnitude - a categorization of client decisions by major areas, such as, curriculum, administration, personnel, staff development, etc. will allow a look at ACCESS outcomes by type of decision.

c) Permanence - external validity seems well-controlled.

Criterion 3: Reliability

a) Quality - a short check on field agent reports might be made (4 cases, for example) to satisfy reliability questions.

b, c) No problems appear.

Criterion 4: Objectivity

Since BFS is an external contractor, there seems to be no question of non-objective evaluation.

Criterion 5: Relevance

a) Quality - the assessment approach seems to address this objective.

b) Magnitude - the evaluation has concentrated only on building and district decision-makers, which implies that effects of the Project depend on them. Is this true, or could Project effects be measured at the staff level which would not appear if only decision-makers are interviewed?

c) Permanence - as with most projects, the ultimate objectives of the Project are not measurable until after Federal funding is over. The measures used and others proposed here will give some indication of long-term prospects for maintenance under state and LEA funding.

Criterion 6: Importance

The evaluation is focusing on the important variables on all three objectives. As noted in earlier criteria, some additional or substituted variables may be evaluated. Generally, the current evaluation is focusing on the most important aspects of the project.

Criterion 7: Scope

The scope of the evaluation is excellent. For the apparent money budgeted for evaluation, the range of objectives evaluated is unusually broad. If there is a concern, it may be that unintended outcomes, a la

Michael Scriven's work on goal-free evaluation, are largely unattended. I would not recommend reducing the current evaluation budget to incorporate such a component, but if additional monies were appropriated, this would be a good evaluation area to investigate. A team of evaluators (or one) might be contracted near the end of the Federal grant period to conduct this evaluation to hit upon unintended effects of the project.

Additionally, the scope might be extended to look at the effects of Project ACCESS on resource units it draws on--ERIC, TALENT, etc. Perhaps these units might support such evaluation. Another variable might be the receptivity of consumers (school district personnel) to research in general, a secondary question, but one with implications for ACCESS, if it is to continue to serve school improvement.

Criterion 8: Credibility

The evaluation and evaluators appear to have credibility due to the well-prepared evaluation plan and independence of evaluators from the Project.

Criterion 9: Timeliness

The use of initial reports is excellent to provide data for refunding and change of Project. The usual problem of being able to find project outcomes only after project funding decisions, exists here; but it has been at least partially circumvented. The evaluators are encouraged to continue this activity.

Criterion 10: Pervasiveness

As this evaluator has never been sure of what this criterion means, it is not applied to the Project ACCESS evaluation.

Criterion 11: Efficiency

It is the opinion of this evaluator that the BFS evaluation has been to this date quite cost effective. The development of instruments, in-service workshops, 59 cases examined, and several reports written are efforts.

Summary:

The BFS evaluation is well-designed. To this date, its activities have been cost-effective and have followed the design. Reports have been good and should continue in the timely manner they have been presented to date. No serious problems have been uncovered, and the suggestions presented are considered helpful but not imperative. Since budget limits will dictate which evaluation activities can be accomplished, decisions by BFS evaluators will have to be made whether to continue or terminate certain activities in order to begin those suggested in the report. There are no clear-cut choices, and these decisions are probably ones of style, not substance.

## References

Havelock, R. and Rogers, E. M. Dissemination and Utilization of Information. Ann Arbor: Institute for Social Research, 1969.

Rogers, E. M. and Shoemaker, F. F. Communication of Innovations. New York: Free Press, 1971.

Worthen, B. and Saunders, J. Educational Evaluation: Theory and Practice. Worthington, OH: Charles A. Jones Co., 1973

# VI. RECOMMENDATION - FULL TIME FIELD AGENTS

RECOMMENDATION-FULL TIME FIELD AGENTS
JOHN RITCHIE 1977

I recommend employment of full time field agents. Half-time field agents are acceptable only if their Project Access responsibilities are on the same priority level as their other half time responsibilities (and clearly differentiated or incorporated) and preferably if both half-time responsibilities are very similar and mutually supportive.

Mountain BOCS states that a half-time field agent is not enough for much field personal contact with schools.Only with a well developed system of gatekeepers will a half-time field agent suffice. Weld BOCS feels that the present level of services were due to the very close similarities of both BOCS and Project Access responsibilities and processes (therfore basically full time field agent work) but cannot continue if referrals for next year realistically double. The Denver District is much too large for even one full time field agent, and the two part time field agents took on Project Access responsibilities in addition to more than full time present responsibilities so that Project Access work was not top priority. SEMBC likewise gave the field agent responsibilities to someone already overburdened with other higher priority district responsibiiities and to another person who continued to provide the same services which represented only one phase of the field agent role.

The recommendation for full time field agents addresses two issues-one is for more time needed to adequately fulfill field agent expectations (especially to provide those service processes that are

vital to the uniqueness and success of assistance in decision making personal contact, information transformation, follow-up) and the other is to make Project Access the top priority of field agents-it enhances motivation, completeness, accountability, and clarification of role.

The ramifications of this recommendation are: Mountain BOCS-strong support for developing gatekeepers to supplement effort of new half-time field agent. Weld BOCS-if the present field agent goes to school half time and remains a half time field agent, then the Project should develop the person that takes his place in Curriculum and Program Evaluation in field agent skills and record keeping. Denver-give full support to the new Staff Development Plan incoporating three new field agents. If plan is not accepted, I would recommend the hiring of a new half-time field agent. Joanne's role would continue as a non-project funded field agent. Dorothy is extremely competent and of high value to the project but does not have the time to follow through on the next stage of working directly with many teachers. Her talents, and the rapport she has developed with the district's administrators, have been well utilized in enhancing the project's awareness throughout Denver. She would now prefer and do well in a supervisory role in the project. SEMBCS-Ruth is very competent at her role of literature searches. However, because this is only one phase of the field agent role and because Ruth would be providing these services anyway, I recommend developing a one person half-time position. Barbara appears to be doing an excellent job with her BOCS in-service training responsibilities and has let Project Access responsibilities take a lessor priority. Therefore, I recommend that Barb be made the half time field agent with a clear differentiation

between her two half time positions or hire another field agent if she continues to place a higher priority on her other responsibilities.

# VII. SPECIAL EVALUATION REPORT
# RESOURCE ORGANIZATION

June 15, 1977
Norris Harms

SPECIAL EVALUATION REPORT: RESOURCE ORGANIZATION
June, 1977, NORRIS HARMS, JOHN RITCHIE

SITUATION

1) Field agents are funded one-half time or less, selected and supervised by local BOCS or districts.

2) Field agent turnover is inevitable (at least 50% this year).

3) Resources come from many sources for many purposes.

4) Under current plans, each field agent is to become an expert regarding a wide variety of resources- this requires extensive training which has only begun.

5) Field agents are short on time, and are beginning to identify local linkage agents ("gatekeepers") to work with clients (information users). It is even more difficult to adequately train gatekeepers to understand resources completely.

6) The Project Director and Staff Developer, with their administrative and training responsibilities, do not have time to handle project requests that come from non-pilot sites.

RESULTS

1) Field agents are heavily using the one consolidated organized information base (ERIC) and the one consolidated program base (State Facilitator Project) but are not linking to more diverse sources of information (such as CDE personnel, universities, etc.).

2) Field agents and users become frustrated with requests which cannot be met by ERIC or the State Facilitator Project and are often left unfulfilled for lack of awareness of other appropriate resources and persons.

3) Field agents have requested a single place to call for more direction in locating multiple resources.

4) All gatekeepers in an area are dependent on the field agent for information retrieval knowledge. Therefore clients cannot be served during the time field agents are temporarily unavailable from overwork, trips, or vacations.

RECOMMENDATIONS

1) Project ACCESS accept responsibility for organizing a central resource information base.

RECOMMENDATIONS

2) Project ACCESS accept responsibility for interacting with field agents in jointly selecting appropriate resources for the information bank.

3) Project ACCESS establish firm guidelines and expectations which must be met by locals who wish to become participants in Project ACCESS. Guidelines should address:
    1. Time commitment or linkage agents
    2. Training commitment of linkage agents
    3. Record keeping of linkage agents

IMPLICATIONS

1) A central resource center would greatly enhance the resource base of all field agents and make that information easily accessible.

2) New field agents, and gatekeepers wanting to assume more field agent responsibilities, could develop their information retrieval skills more quickly and comprehensively.

3) Trained gatekeepers could by-pass the field agent for urgent requests or when the field agent was not available.

4) Easier training of field agents and constant accessibility of resource retrieval assistance would allow the project to more easily absorb the service interruption due to field agent and gatekeeper turnover.

5) A resource center would facilitate the expansion and connecting of gatekeepers into a communication system network.

6) A resource center would free up more time for the Project Director and Staff Trainer to put into their priority responsibilities and concerns.

7) Less dependence on field agent training and turnover effects would encourage districts to financially support local project field agents, and would make it easier for new sites to be added to the network.